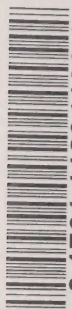


CA24N
IT
-TT53

Government
Publications



3 1761 11894106 1

TOURISM DEVELOPMENT STRATEGIES/OPPORTUNITIES
FOR THE
SAULT STE. MARIE-WAWA ZONE

Balmer, Crapo & Associates

RECREATION/TOURISM RESEARCH, PLANNING & MANAGEMENT



CA20N
IT
-77753

TOURISM DEVELOPMENT STRATEGIES/OPPORTUNITIES
FOR THE
SAULT STE. MARIE-WAWA ZONE

Prepared for:
Ministry of Industry and Tourism
Province of Ontario

by

Balmer, Crapo + Associates Inc.
125 Waterloo Street, Waterloo, Ontario N2J 1Y3

March 1977



SUMMARY

PURPOSE

This report contains recommendations for the development of the tourism industry in the Sault Ste. Marie/Wawa "Tourism Development Zone". It is intended primarily for existing operators and potential investors, but also suggests tourism development guidelines for consideration by municipal and provincial governments.

GOALS AND RECOMMENDATIONS FOR DEVELOPMENT

The suggested strategy is based on a set of broad goals for tourism. These are: improving the competitive position of the zone; increasing total and per capita spending; and increasing year-round business. These goals have led to a series of recommendations including; building on and diversifying existing operations; investments (both moderate and large) in new opportunities; improvement in service facilities; and suggestions concerning cooperation, packaging, themes and image .

IMAGE

The scenic wilderness resources of the zone should be the base for development and a zone-wide image based on these resources should be established. An image of "Accessible Wilderness" is highly appropriate, and will position the zone in the marketplace. Based upon this image, the objective of zone development should be to create one of the most outstanding accessible wilderness areas east of the Rockies.

COOPERATION

An important step to achieve this objective is to assist the existing industry with its existing facilities. Cooperation among operators must be increased. No one operation in the zone is sufficiently large to operate independently. Cooperation will involve: common support of the zone image; common themes; packaging of components offered by individual operators. The consequence of cooperation will be an improved product with higher value to the tourist.

THEME

Cooperative theming can be implemented through a variety of techniques such as the theming of community structures - both in the private and public sectors. Theming defines the types of experiences that can be expected in the zone. Promotional pieces should also carry a consistent theme.

IMPLEMENTATION AND STAGING

The study suggests action to be taken by existing operators, municipal government, certain Provincial Ministries, and the Algoma-Kinniwabi Travel Association. The staging of development is of prime importance. First, steps should be taken to increase cooperation among existing operators for their common benefit. There should also be improvement in existing facilities. Progress in these two aspects of staging, should improve the possibilities for new developments.

DEVELOPMENT GUIDELINES

The report discusses and suggests specific development guidelines for various sections of the tourism industry. There are guidelines for; attractions, the Agawa Canyon Train Tour, accommodation, food services, retail stores, information services, and municipalities. In addition, general principles of development are suggested. These should be carefully considered and reflected in developing specific opportunities.

SPECIFIC DEVELOPMENT OPPORTUNITIES

Several forms of development are recommended, involving new construction, diversification, expansion and upgrading. Developments should respond to current deficiencies and be compatible with the "Accessible Wilderness" image. Some of the new development opportunities take advantage of the scenery - scheduled air and boat tours, safaris, etc. Others build on the historical heritage - tours of old mines, lumberjack/voyageur/native Indian shows. Other opportunities build on the natural resource base - canoeing, raft rides, wilderness gateway resort, water or ski oriented resort, vacation residence community.

Air tours could range from simple one hour sightseeing, to a two day northern trip with interpretation of the northern wilderness for photographers, sportsmen and naturalists.

Boat cruises along the Lake Superior (or Lake Huron) shoreline could vary in length from a few hours to a full day or overnight. The latter might be tied in with the Agawa Canyon Train Tour using Sault Ste. Marie and Wawa for overnight accommodation. Overnight tours on the Agawa Canyon Train Tour could build on the strong existing appeal of the day tour.

Several rivers offer potential for canoe trips varying in length from a few hours to about 6 days. Raft rides appeal to a similar market. The White-fish rapids might be one suitable location for a short raft ride. Other locations have potential for longer rides.

The range of resort possibilities are all based on the wilderness assets of the zone. There should be potential to create an all-season attraction using the zone's excellent snowfall, good vertical drops, impressive scenery and inland lakes. Development of a vacation residence community might be an important component of this all-season resort. The community and the resort would be mutually supporting, the resort offering activities and the residence owners providing a base market. Any resort development involves a significant investment but offers the potential to attract a larger potential market of longer duration visits with the associated financial benefits.

There should be a clearly recognizable focal point to inform the tourist about the accessible wilderness features of the zone and to encourage travel throughout the zone. The City of Sault Ste. Marie is the logical centre to provide this focus. Tourism facilities, including services and information, should be clustered in a central location in the City. New development is required. A 'Northern Centre' is suggested as a vehicle to fulfill these objectives. Such a centre should be located close to the waterfront near the Civic Centre and be of a scale to attract visitors across the border from the United States. The Centre would serve both visitors and residents alike. It would provide a mix of attractions and services, such as travel information centre, amusement area, industrial exhibition space, tour packagers and retailers, cultural exhibitions, marine museum and aquarium. This suggested Northern Centre

would probably involve a combination of private and public sector participation.

Many visitors will wish to stay in the urban centres only, to take day excursions into the zone's wilderness area. Existing urban centres within the zone must recognize their responsibility to act as service centres for visitors. Sault Ste. Marie and Wawa are the key service centres. Both require positive beautification and theming programs.

RESOURCES

The zone includes impressive scenery along the Lake Superior shoreline, rugged inland terrain, and numerous lakes. Transportation facilities to and within the zone encourage wilderness viewing and touring. A large proportion of this wilderness is within easy access of the zone's two principal urban service centres - Sault Ste. Marie and Wawa. This base of natural features currently generates tourism activities consisting principally of scenic viewing, hunting and fishing. Alternatives to hunting and fishing need to be encouraged. There is potential to build upon this natural resource base in such activities as boating, winter sports, and extensive activities, e.g., canoeing, hiking, etc.

The Agawa Canyon Train Tour, the best known attraction in the zone, takes advantage of the tourists' interest in rail travel and the zone's scenic beauty. In addition to the natural attractions of the zone, there are historical and industrial resources worthy of development, including the fur trade, mining, timber and transportation.

This variety of opportunities should form the base for development which will encourage visitors to stay longer.

MARKETS

<u>VISITOR ORIGIN</u>	<u>Person-Visits</u>		<u>Expenditures</u>	
	<u>(Millions)</u>	<u>%</u>	<u>(\$ Millions)</u>	<u>%</u>
<u>Ontario</u>				
North Eastern	1.0	37		
Remainder of Province	<u>0.6</u>	<u>22</u>		
Sub-Total	1.6	60	15.5	41
<u>United States</u>				
Michigan	0.6	22		
Remainder of U.S.	<u>0.2</u>	<u>7</u>		
Sub-Total	0.8	30	17.0	46
<u>All Other</u>	<u>0.2</u>	<u>9</u>	<u>4.9</u>	<u>13</u>
<u>Grand Total</u>	<u>2.7</u>	<u>100</u>	<u>37.4</u>	<u>100</u>

Note that U.S. plus 'All Other' account for only 39% of person-visits, but generates 59% of expenditures. Furthermore, about half of U.S. visits are day visits only.

Although the zone is some distance from major population centres around the Great Lakes, it is the closest 'wilderness' area available. Because of this distance, the marketing focus should be on increased vacation trips. It must be recognized that there is fierce competition for the tourist dollar, and that there is significant competition from tourism facilities between the zone and such major population centres. Zone residents contribute substantially to tourism revenues. However, the zone's population is small (100,000) and is not expected to increase rapidly. There is a good business market, composed of travellers using the Trans-Canada Highway.

SUPPORT SERVICES

(a) Transportation

Most tourist travel in the zone is by car. The Trans-Canada Highway (No. 17) services the zone, passing through the zone's two principal urban centres, Sault Ste. Marie and Wawa. A major north-south highway through Michigan (I-75) ends at Sault Ste. Marie. There are few highways

into the interior of the zone. This tends to ensure preservation of the large wilderness areas, an asset in itself. The zone is serviced by three scheduled air carriers. There are direct flights from Toronto which permits convenient access to all international markets. Scheduled bus service is good. The presence of the St. Lawrence Seaway permits access by ocean-going vessels.

(b) Accommodation

All types of accommodation are available in the zone. There is an adequate to over-supply of accommodation although there are development opportunities for resorts and additional self-contained units. There is a need to upgrade a large proportion of the existing accommodation. Several fly-in camps are serviced by the zone.

(c) Information Services

Information services should be improved, primarily through changes in location and extending the services of travel information centres. All tourism operators have a role in the cooperative supply of information to visitors and potential visitors.

STUDY BACKGROUND

This report is a second phase of a strategy for tourism development in Ontario. The first phase presented a province-wide development strategy with emphasis on opportunities for the private sector. It identified seventeen tourism development zones. These zones are geographic areas which offer good development opportunities for private industry, while concentrating efficiently the necessary public investment in supporting facilities. One such tourism development zone is Sault Ste. Marie-Wawa (Figure 1).

The 17 zones identified in "Framework for Opportunity" were grouped into three categories with respect to priority for study. The Sault Ste. Marie/Wawa zone was placed in the first priority group. This group includes zones from across the province, representing a variety of opportunities and problems. This first priority group was also intended

to include zones where a development plan could contribute to stimulating action and solving problems.

This current study of the Sault Ste. Marie-Wawa zone involves careful analysis of tourism resources and markets. It considers both the current picture and possible future conditions. Extensive discussions were held in the zone with those directly and indirectly involved in tourism. This formed the base for the selection of the suggested development guidelines and potential opportunities.

Potential investors should refer to the province wide strategy, "Tourism Development in Ontario: "Framework for Opportunity" to place the Sault Ste. Marie/Wawa zone within the context of provincial guidelines and development policies.

FIGURE 1

LOCATION OF
THE SAULT STE MARIE - WAWA ZONE



TABLE OF CONTENTS

	Page
Summary	iii
Acknowledgements	xv
 CHAPTER	
I INTRODUCTION	1
II CURRENT SITUATION	3
A. Existing Supply - Strength, Problems and Development Implications	3
1. Natural Resources/Features	3
2. Historical and Cultural Resources	6
3. Service Centres	9
4. Tourism Plant	11
B. Markets and Market Potential	29
1. Market Overview	29
2. Potential Markets	39
C. Intervening Opportunities	41
D. Existing Operators' Attitudes and Desires	43
E. Population - A Resource and Its Attitudes Towards Tourism Development	46
1. Implications for Tourism Development	47
2. Historical/Cultural Aspects of Population	48
3. Resident Perceptions of Tourism Development	49
F. Land Ownership and Planning Jurisdictions	51
III DEVELOPMENT OBJECTIVES	55
A. Summary of Assets	55
B. Summary of Problems	57
C. Likely Future if Development Trends Don't Change	60
D. Local Perspective	63
E. Goals and Objectives for Tourism Development in The Sault Ste. Marie-Wawa Zone	64

TABLE OF CONTENTS (cont'd.)

CHAPTER		Page
IV	DEVELOPMENT STRATEGY: PRINCIPLES AND GUIDELINES	67
	A. Development Principles	68
	1. Getting an Image	68
	2. Get Cooperation	70
	3. Do Appropriate Theming	70
	4. Package Attractions and Services	73
	5. Diversify Existing Attractions and Facilities	76
	6. Cluster Attractions and Services	80
	7. Reduce Negative Impact	80
	8. Create New Development	84
	B. Development Guidelines by Sectors	86
	1. Guidelines for Attractions	86
	2. Guidelines for the Agawa Canyon Train Tour	92
	3. Guidelines for Accommodation	93
	4. Guidelines for Food Services in the Sault Ste. Marie-Wawa Zone	99
	5. Guidelines for Retail Stores and Shops	100
	6. Guidelines for Information Services	101
	7. Guidelines for Municipalities	103
V	DEVELOPMENT OPPORTUNITIES	107
	1. Zone-Wide	109
	2. Sault Ste. Marie Sub-Zone	133
	3. Wawa Sub-Zone	155
	4. Highway 17 North - Sub-Zone	162
	5. Highway #17 East/St. Joseph Island Sub-Zone	168
	6. Interior Sub-Zone	175
VI	IMPLEMENTATION	179
	A. The Long Range Picture	179
	1. The Optimistic View	184
	2. The Moderate View	184
	3. A Pessimistic View	185
	B. Stages in Development Process	186

TABLE OF CONTENTS (cont'd.)

CHAPTER		Page
V	IMPLEMENTATION (cont'd.)	
	C. Roles of Various Participants in Developing an Optimum Integrated Tourism Industry	190
	1. Existing or Potential Operators - What Are Your Responsibilities?	190
	2. Algoma-Kinniwabi Travel Association - What Are Your Responsibilities?	191
	3. Municipal Governments - What Are Your Responsibilities?	192
	4. Ontario Ministry of Industry and Tourism - What Are Your Responsibilities?	193
	5. Ontario Ministry of Natural Resources - What Are Your Responsibilities?	194
	6. Northern Ontario Development Corporation - What Are Your Responsibilities?	195
	D. Public Assistance Available to Aid in the Development of Tourism	196
<u>APPENDICES</u>		
Appendix A	NATURAL RESOURCES/FEATURES	197
B	HISTORICAL RESOURCES	207
C	ACCOMMODATION	211
D	TRANSPORTATION	215
E	MARKET BACKGROUND DATA	222
F	SUB-ZONE AREAS SUPPLEMENTARY INFORMATION	237
	1. Sault Ste. Marie Sub-Zone	239
	2. Wawa Sub-Zone	240
	3. Highway 17 North Sub-Zone	242
	4. Highway 17 East Sub-Zone	243
	SELECTED REFERENCES	249

ACKNOWLEDGEMENTS

Many individuals and organizations were asked to contribute information in the preparation of this strategy. The response was exemplary - and sincere thanks are extended to all who helped in the completion of this study.

Special mention must be made of the cooperation and assistance provided by the Tourism Division, Ministry of Industry and Tourism. All three Branches (Tourism Development, Tourism Research, and Tourism Marketing) made the expertise and experience of their staff available.

A special vote of thanks is extended to the many members of government, trade associations and private enterprise within the zone. Contributors from these include the following:

SAULT STE. MARIE

Provincial Government

P. Croghan	Tourism Development Officer, Ministry of Industry & Tourism
S. Courtney	Toursim Development Officer, Ministry of Industry & Tourism
J. Sellers	District Manager, Ministry of Natural Resources
O. Wohlgemuth	Wildlife Branch, Ministry of Natural Resources, District Office
R. Broad	Parks Branch, Ministry of Natural Resources, District Office
I. Valentine	Ministry of Natural Resources, District Office
A. Wright	Senior Planner, Ministry of Natural Resources, Regional Office
C. Clark	Regional Parks Planner, Ministry of Natural Resources, Regional Office
D. Armstrong	Ministry of Natural Resources, Regional Office
A. Harris	Ministry of Natural Resources, Regional Office
A. Glassford	District Officer, Northern Affairs, Ministry of Natural Resources

W. Terry	Algoma Health Unit
D. Tulloch	Director, Ministry of Treasury, Economics & Intergovernmental Affairs, Northeastern Region
G. French	District Engineer, Ministry of Transportation and Communication

Local Government

N. N. Trbovich	Mayor, City of Sault Ste. Marie
D. Evans	City Administrator, Sault Ste. Marie
J. Bain	Planning Director, Sault Ste. Marie & Area Planning Board
J. Sniezek	Senior Planner, Sault Ste. Marie & Area Planning Board
H. A. Brain	Commissioner of Parks & Recreation, Sault Ste. Marie
D. Bell	Civic Engineer, International Bridge Authority
D. Kinney	Sault North Planning Board

Trade Associations/Private Enterprise

B. McLeod	Manager, Algoma Kinniwabi Travel Association
T. E. Iley	Manager, Sault Ste. Marie & District Chamber of Commerce
J. Corbett	Owner/Manager, Northwoods Resort, Chairman, Tourism and Convention Committee, Sault Ste. Marie Chamber of Commerce
W. B. Wallis	Director, Chamber of Commerce, Sault Ste. Marie, Michigan
V. Verdone	Y.M.C.A., Sault Ste. Marie
C. Chamberlain	Director, Michigan State Travel Information Centre

J. J. Hilsinger	President, Water Tower Inn
I. Munroe	General Manager, Water Tower Inn
D. Quinn	Manager, Sheraton Caswell Hotel
G. Nori	Owner/Manager, Windsor Hotel
J. Adams	Owner/Manager, Adams Motel, Vice President, Ontario Motel Association
F. Gallo	Owner/Manager, Shady Rest Motel President, Sault Ste. Marie Motel Association
N. Orzechowski	Owner/Manager, Canadian Motor Hotel, Vice President, Ontario Hotel/Motel Association
C. Ketola	Owner/Manager, Beaver Hotel
J. Robinson	District Manager, Ontario Motor League
S. E. Stockfish	District Manager, Air Canada
L. R. Beilhartz	Reservation Sales Supervisor, Air Canada
B. Dale	President, Airdale Services
J. McWhirter	Manager of Marketing, Transair, Winnipeg
E. Moore	Manager, Passenger Services, Algoma Central Railway
S. Filipchuk	Assistant Manager, Passenger Services, Algoma Central Railway
S. A. Black	General Manager, Rail Division, Algoma Central Railway
W. L. Oliphant	Manager, Lands and Forests Division, Algoma Central Railway
N. Hirt	General Manager, Algocen Realty
A. Lebon	Manager of Station Mall, Algocen Realty
G. Majic	Manager, Hiawathaland Bus Tours
A. Biagini	Co-owner, Algoma Tours Packaging

A. Shanks	Loch Cruises - S.S. Mark Twain & M.V. Bon Soo
J. Marinelli	Supervisor of Community Relations, Algoma Steel Corporation Ltd.
J. Valentine	Community Relations Division, Algoma Steel Corporation Ltd.
H. Gillespie	Manager, The Wooden Spoon/Loon's Nest, Station Mall
D. Matthewman	Searchmont Valley Ski Resort
B. Simpson	Program Director of Hotel Studies, Sault College

WAWA

Government

R. Alton	District Manager, Ministry of Natural Resources
F. Dunn	Planner, Ministry of Natural Resources, District Office
J. Aquino	Northern Affairs Officer, Ministry of Natural Resources

Trade Associations and Private Enterprise

D. Liddle	Travel Algoma Ltd.
R. Weeks	President, Wawa Chamber of Commerce
C. Schmidt	President, Algoma-Kinniwabi Travel Association
B. Christensen	Owner/Manager, Sportsman's Motel
L. Buck	Marina Operator, Michipicoten Harbour
B. Erøchhook	Sault College, Wawa Campus

THESSALON

Local and Provincial Government

W. St. John	Mayor of Thessalon
M. Smith	Ministry of Housing, Regional Office

Trade Associations and Private Enterprise

W. Moore	Owner/Manager, Melwel Lodge, Past President, Northern Ontario Tourist Outfitters
H. Courtney	Marina, Gift Shop Operator, St. Joseph Island
Chief P. Boissoneau	Garden River Indian Reserve
Chief J. Corbiere	Batchawana Indian Reserve

Definitions

The reader will frequently encounter two terms throughout this document. It is worthwhile defining them clearly at the outset.

A. Tourist

"Tourist shall mean any Ontario resident travelling in excess of 25 miles from his home for any purpose other than commuting to work and any non-resident (other province, U.S.A., other foreign) who enters Ontario for any purpose other than commuting to work."

It is significant to note that this definition includes much more than just the 'pleasure traveller/tourist'. Business travel beyond 25 miles and all out-of-province visitors (except commuters) are covered by this definition. It is clearly recognized that the characteristics of the tourist vary widely, depending on origin and trip purpose. This is not overlooked in this study.

B. Tourism Plant

The Tourism Plant can be divided into six general categories:

1. Activity-related--servicing specific recreation/tourism activities or combinations of activities (e.g., golf course, swimming beach, shops;
2. Food Services--from fast food service through to gourmet restaurants;
3. Accommodation--from campgrounds through to 'grand' hotels;
4. Transportation--including automobile, air, rail and boat facilities and supporting services;
5. Information (Reception/Direction);
6. Infrastructure and Industry Services--required to supply and maintain the 'direct' services outlined above (e.g., wholesalers).

Many tourist operations combine several of the 'plant' categories. For example, a resort combines accommodation, food services, activity-related 'plant' facilities (e.g., boats, docks, golf courses) and, sometimes, transportation (e.g., gasoline, limousines, aircraft).

INTRODUCTION

This report is the second phase of tourism development planning in Ontario as it applies to the Sault Ste. Marie-Wawa tourism development zone. The first phase in the planning process, 'Tourism Development in Ontario: A Framework for Opportunity', identified seventeen preferential tourism development zones. The development zone concept was adopted in recognition that certain areas of the province possess above-average potential for tourism development. The premise is that concentration of development usually results in lower costs and facilitates management. The development zone concept is thereby a means to allow more efficient use of private and public resources in tourism development.

This report identifies and outlines tourism development strategies for the Sault Ste. Marie-Wawa zone. In "Framework for Opportunity" there were seventeen tourism development zones, grouped into three categories for purposes of prioritizing them for detailed study. This grouping considered the likelihood that a strategy could stimulate development and contribute to solving problems. Also, a mix of various types of zones (urban, non-urban, geographic location, size of tourism revenues) was placed in the first priority category. The Sault Ste. Marie-Wawa Zone was judged to be appropriate for the first category.

Included in the report are numerous potential tourism investment opportunities which are compatible with the development strategies.

1. How the Report Can Be Used

The function of this report is twofold; 1) it is a guide for existing operators and various levels of government as to the actions which must be taken to help create an optimum integrated tourism industry for the zone, and 2) to present to the private sector possible development opportunities for new investment.

This report assists existing operators by:

- .describing their place in the overall tourism development strategies for the zone
- .offering sector development guidelines to help them improve their operations

It assists various levels of government by:

- .outlining the responsibilities of each participant in ensuring successful tourism development in the zone
- .presenting guidelines for government involvement

It assists potential investors/developers by:

- .identifying development opportunities by type, location and scale
- .describing how these opportunities fit into the overall tourism development strategy for the zone

2. The Process

The first step involved an examination of the current tourism industry in the Sault Ste. Marie-Wawa zone. The supply components of the industry were analyzed on the basis of their strengths, problems and implications for development. Current travel markets and their characteristics were identified and assessed. Predicted changes in travel patterns were also investigated to identify potential markets based on the current tourism plant.

The second step involved identifying local perspectives towards tourism development. Recognizing that existing operators would play a major role in the further development of tourism, their attitudes, concerns and needs were obtained. To minimize negative social impacts and to facilitate the implementation of this report, workshops with groups of residents were held. These workshops identified the concerns and desires of the resident population regarding tourism and tourism development.

The third step undertaken was the preparation of the probable future condition in 5-10 years of the industry if no major changes were made to the current tourism plant. This step was important to assess priorities for development and provide the longer term perspective for improving the industry.

The fourth step was the formulation of tourism development goals and objectives for the zone based on the analysis of problems, assets, opinions of appropriate parties, trends, and likely future.

The fifth step involved the formulation of necessary development principles, as well as guidelines that must be adopted to enable the realization of the stated development goals and objectives. Possible development opportunities which were in keeping with the development principles were also identified and assessed.

The final step dealt with the development of an implementation strategy to serve to create an optimal integrated tourism industry. This included the identification of responsibilities for various participants in the development process.

CHAPTER II

CURRENT SITUATION

A. Existing Supply - Strength, Problems and Development Implications

1. Natural Resources/Features*

Rugged, rolling and varied topography characterize the Sault Ste. Marie-Wawa zone. The most notable relief occurs in conjunction with bedrock outcropping along the Lake Superior shoreline. The zone's topographic variety provides the potential for many and various recreational activities. The Lake Superior shoreline has very high recreational capability for extensive use (Figure II-1).** Similarly does the interior and St. Joseph Island/North Channel area have high capability. Extensive recreational activities include viewing, hiking or walking, scenic driving, cross country skiing, and so on.

Within the Sault Ste. Marie-Wawa zone is one of the few areas in Ontario with outstanding intensive use recreation potential. This is the section called the Batchawana Bay, Goulais Bay and Agawa Canyon area noted for the extensive sandy beaches on the Lake Superior shoreline. Cold water does limit bathing, but viewing and camping opportunities remain very good. At the shoreline are spectacular views, deep water harbours and waterfalls. Also, Indian pictographs are found along the Agawa Bay shoreline. The inland rugged terrain offers good potential for ski hills and viewing. This combination of high quality varied recreational opportunities makes the area especially notable.

In the zone's southern portion, several inland lakes and St. Joseph Island have very good bathing beaches. The shores are well suited to camping and lodging.

*Refer to Appendix A for a more detailed discussion on natural resources/features.

**Ontario Government. Ministry of Natural Resources. Strategic Land Use Plan for Northeastern Ontario. Background Information. 1975.



FIGURE 11 - 1

The North Channel shoreline is not notable for intensive recreation. It does, however, have some good bathing beaches and stretches of shoreline are suited to camping and cottaging.

The Michipicoten area, in the zone's northern part, also has high intensive use recreation capability. Lake Superior's shoreline offers good beaches for bathing and camping, lodging sites and deep water harbours.

The zone's water resources provide numerous recreation opportunities. The North Channel is considered to be among the best boating areas in the world. A recent study recommended the good boating possibilities for Lake Superior, despite its reputation for danger.* Regardless, visitors are attracted to viewing 'moody and mystic' Lake Superior. The zone's rivers provide canoeing opportunities for beginners to advanced. Hydro dams in the area tend to limit the canoeing to the spring season, leaving only a few rivers (i.e., the Montreal River and the Goulais River) passable in summer months.

Many of the zone's inland lakes are small and oligotrophic,** which limits types and amounts of development. Oligotrophic lakes are located in the area south of Lake Superior Provincial Park to the North Channel.

Fishing is one of the zone's most popular outdoor recreation activities. Sports fish found in the area include popular varieties such as lake trout, speckled trout, rainbow trout, pickerel and northern pike. The depletion of fish stocks is a problem resulting from angling pressures and metal waste and nutrient loading of waters. The problem is most critical on road accessible lakes along Highway #17. Today, the best interior fishing lakes are in the zone's northern sections. The North Channel is a popular fishing area and recently there has been encouragement for fishing in Lake Superior.

The Sault Ste. Marie-Wawa zone is, for the most part, timber covered with a mixture of hardwoods (hard maple, red maple, yellow birch) and softwoods (white pine, white spruce and firs). Algoma Central Railway's fall colour train has contributed to steadily increasing interest in fall colour tours. The zone's extensive areas of forest cover provide excellent habitat for popular game including moose, bear, deer and a variety of small game. Hunting, and in particular moose hunting, is an important 'shoulder' season activity. Some depletion of moose populations has occurred, especially in road-accessible areas where hunting pressures are greatest.

* Hedlin Menzie & Associates Inc. North Shore Lake Superior Recreation Study: Volume 2, Physical and Economic Studies, June 1974

** Oligotrophic: poor in plant nutrient minerals and organisms and rich in oxygen; extremely sensitive to development and use.

The zone's climate is classified as modified continental with long, cold winters and short summers. In the summer, water temperatures of Lake Superior and many interior lakes in the zone's northern portion are too cool for comfortable swimming. Winter tourism is limited as weather conditions hinders travel to and within the zone. Low temperatures also tend to limit the available days for comfortable outdoor recreation activities. The zone does benefit from a good mean annual snowfall of over 110 inches in some locations. This provides an excellent base for cross country and downhill skiing and snowmobiling.

The 'wilderness/natural' setting of the zone is its primary appeal to travellers. Increasing fishing and hunting pressures prevent the ongoing expansion of these activities. Alternative and varied opportunities to participate in the 'wilderness' need to be encouraged and developed. An attraction for many visitors is the opportunity to view the wilderness by different modes of transportation (air, rail and water). Tours, both organized and unorganized, to unique natural features can be encouraged (Figure II-2). Spring and fall activities other than fishing and hunting, such as canoeing, hiking and rock hounding, are natural alternatives.

'Wilderness' interruptions caused by mining and timber operations can often offer opportunities rather than limitations. Industrial tours can add to the travel experience.

2. Historical and Cultural Resources

The Sault Ste. Marie-Wawa zone has a rich and unique heritage. In pre-historic times, this was an area of considerable importance to early native populations, and since 1617, it has been a centre of significant activity by those of European origins.

A number of historical themes are represented in the zone, each of which reflects an important aspect of the changing relationship between man and the natural environment. Most prominent are fur trading, mining, transportation, and lumbering; but past military activity, and developments in agriculture, fishing, recreation, and the history of art have contributed significantly to the area's heritage.

*Refer to Appendix B for a more detailed description of the area's history.

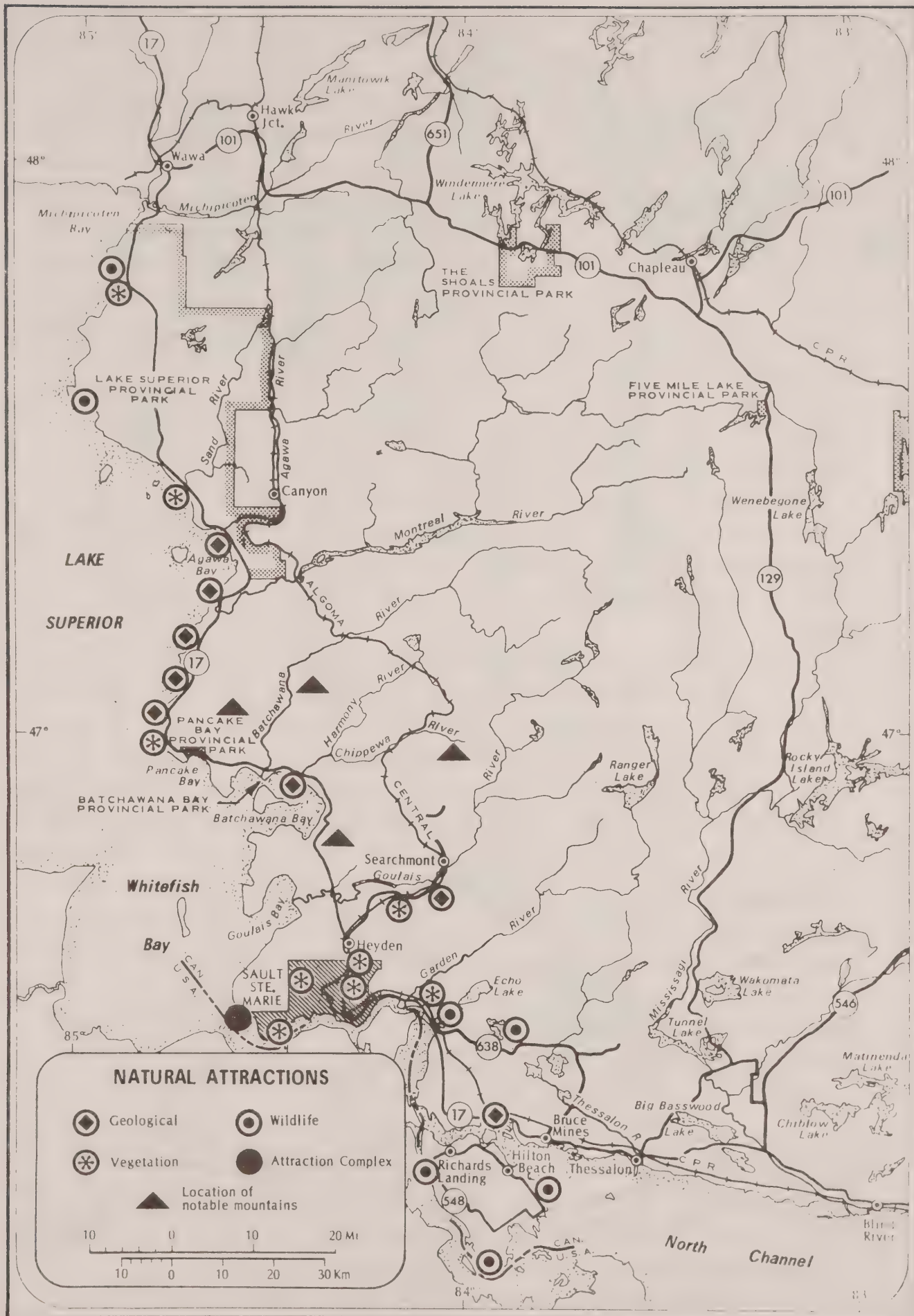


FIGURE II-2

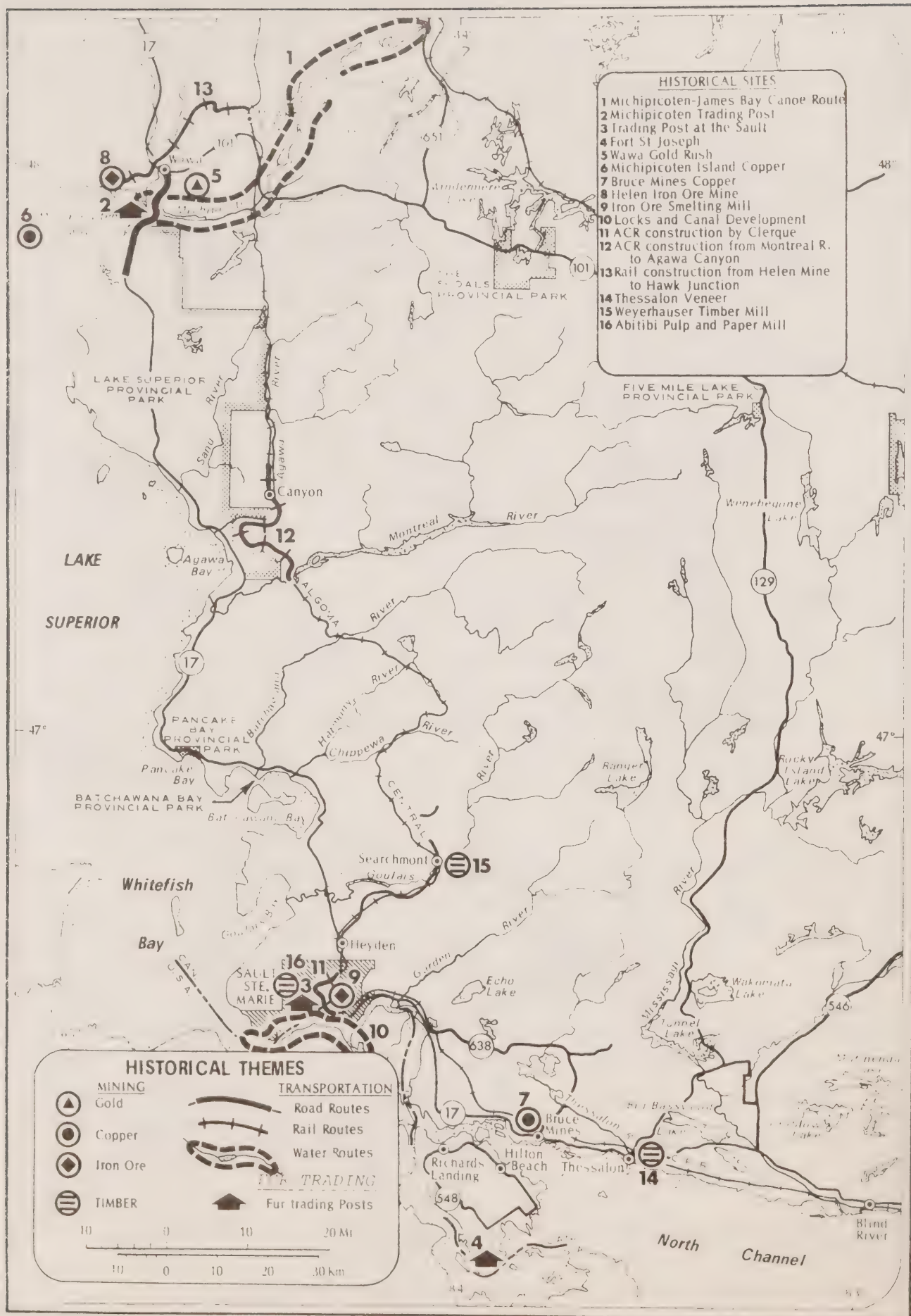


FIGURE II-3

The historical themes of the Sault Ste. Marie-Wawa zone offer many potentials for tourism development. Only a few historic attractions are developed, however, and these are widely dispersed. Existing historical features such as the Old Stone House, Bruce Mines United Church and Fort St. Joseph individually are not major tourist drawing attractions. Rather, these places usually are visited by travellers who are already in the area. As a general attraction to the zone based on its heritage, however, there is great potential within the existing Provincial Parks system, and for initiation of an Historical Parks programme. Whitefish Island is a key heritage site, and should be developed to communicate its national significance.

Figure II-3 reveals the locations of some of the highlights of the area's history. These encompass a number of different cultural landscapes, in both rural and urban settings. It can be seen that the two urban places, Sault Ste. Marie and Wawa, are central to the major areas of historical attraction. These centres should be encouraged to display their history, through application of heritage conservation programmes, and downtown redevelopment which is sensitive to heritage values.

The heritage of the zone is represented not only in its buildings and landscapes, but in its remarkable mix of cultural and ethnic groups. These include the German Austrian Association, Estonian Association, Chateau Pines Finnish Group, Italian Folk Association, Soo Latvian Association, and many more. Retaining their cultural and historical traditions and values is the primary function of these groups. Each year, they stage several small events, of interest to residents of the area. Cultural groups can be viewed as resources to the tourism industry. They should be encouraged to expand and upgrade their special events to appeal to and act as a draw to tourists. Ethnic restaurants and speciality crafts have great appeal to the travelling public.

The native population in the Sault Ste. Marie-Wawa zone could also become involved in tourism. Native lifeways and the sale of Indian crafts are very attractive to travellers, particularly overseas visitors.

3. Service Centres

Service centres are nodes within the zone with the function of providing travellers with both direct services, such as accommodation, restaurants, shopping, service stations, attractions, and indirect services, such as hospitals, liquor stores, laundries, banks and transportation carriers. Table II-1 details the services provided in the four major service centres.

TABLE II-1

DIRECT AND INDIRECT TOURISM SERVICES

Service Centre (Population)	Services Accommodation (by number of establishments)	Restaurants/ Food Services	Shopping	Hospital	Liquor Stores	Banks	Transportation Services			
							Air	Rail	Bus	Marinas
Sault Ste. Marie (78,000)	Hotels 16 Motels 31 Total Accom. Units- 1,484 Campgrounds- 3	126	All Services	2	4	22	3	2	4	1
Wawa (including Michipicoten Twp.) (5,000)	Hotels 5 Motels 13 Total Accom. Units- 481 Campgrounds-17	28	Basic	1	1	3	1	1	1	1
Thessalon (1,853)	Hotels 2 Motels 6 Total Accom. Units- 137 Campgrounds- 2	2	Basic	1	1	1	-	1	1	1
Bruce Mines (480)	Hotels 1 Motels 4 Total Accom. Units- 44	4	Basic	-	1	1	-	1	1	-

Other minor service nodes are Echo Bay, Desbarats, Searchmont, Heyden, Richards Landing, Hilton Beach. They provide minimal services. Gas stations, liquor stores, general stores and some accommodation is typically all that is offered. Additional development and expansion of services should be concentrated in service nodes.

Sault Ste. Marie, the zone's major service centre, services the whole zone. Sault Ste. Marie is the distribution hub of the zone. It is the main transportation centre and an international entrance to the zone. Wawa functions as the zone's northern service centre. It is the stepping-off point to fly-in activities and provides supplies and air transportation services for these activities. Wawa also services a large pass through market.

Thessalon and Bruce Mines act as service centres for the Trans Canada traffic and resorts and cottages on the interior lakes to the north. Their main tourism function is providing dining facilities, groceries and auto services. Accommodation in these two centres is used primarily by the pass through rather than destination travellers.

4. Tourism Plant

This section will discuss the direct tourism services in the Sault Ste. Marie-Wawa zone. The following components of the tourism plant have been assessed:

- a. Attractions and Events
- b. Accommodation
- c. Food Services
- d. Information Services
- e. Transportation
- f. Recreation Facilities

a. Attractions and Events--The Sault Ste. Marie-Wawa zone has numerous attractions and events which characterize:

- 1) the history of the area;
- 2) the natural beauty and features of the area; and
- 3) the industrial base of the area.

The appeal of the attractions and events varies from local to provincial. Visitation to the attractions occurs predominantly in the summer. Previously the 'shoulder' seasons received high visitation from hunters and fishermen. However, the depletion of fish and game and changes in hunting regulations has effected a decrease in visitors in the spring and fall. Winter opportunities are presently limited. The winter attractions and events, such as Searchmont Ski Resort, the snowmobile trails and the Bon Soo Winter Carnival, are more local than regional or provincial.

Two major attractions do have provincial appeal -- the Agawa Canyon Rail Excursion, and the scenic drive along Lake Superior's shoreline. The proposed development -- King Mountain Four Seasons Resort -- may also, in the long term, have provincial appeal.

Table II-2 identifies the zone's attractions and events, categorizing them as primary and secondary attractions. Table II-2 also summarizes problems and implications for tourism development.

TABLE II-2

ATTRACTIONS AND EVENTS - APPEAL, PROBLEMS AND IMPLICATIONS

CATEGORY	ATTRACTION	LOCATION	TOURISM APPEAL	PROBLEMS AND IMPLICATIONS FOR DEVELOPMENT
Primary Attractions*	Agawa Canyon Train Excursion - including Fall Colour Tour and Snow Train	Sault Ste. Marie (originates)	Approximately 90,000 visitors/year 70% American 20% Ontario res. Snow Train 5-7,000 passengers/year	.75% of visitors stay in area at least 1 night (1975) .passengers become bored on return trip from the Canyon .more activities should be offered within the Canyon and on the train .passengers should be made aware of other opportunities in the area to keep them in the area longer ----- .most park visitors are touring and not staying in the area for any length of time .visitors should be made more aware of opportunities in the area
	Lake Superior Provincial Park	North section of the zone	173,128 visitors in 1975 and 17,041 campsites occupied	
	Searchmont Ski Resort	Hwy. #552, 32 miles north of Sault Ste. Marie	Mostly local residents but does draw skiers from northeastern Ontario	.few services near the ski resort (e.g., accommodation, restaurants) .totally dependent on weather because it doesn't have snow-making equipment .to attract a more distant market, more development near the ski hill is needed ----- .the little elevation and short runs will not attract non-residents or residents from any great distance.
	Buttermilk Hill Ski Resort	Hwy. #17 north-20 miles north of Sault Ste. Marie	Totally local residents	.a desintation park for many of the zone residents .predominantly just a night stop over, for auto touring travellers .swimming, hiking and other outdoor activities should be provided near park .this provincial park should possibly be considered for the Ministry of Natural Resources' new 'Leasing Program of Parks' because of its high occupancy
Secondary Attractions**	Pancake Bay Provincial Park	Hwy. #17 north-north shore of Batchawana Bay	In 1975 - 218,729 visitors and 18,211 campsites were occupied	
	Amusement Chief Shingwauk and M.S. Bon Soo Boat Tours Hiawathaland Sight-seeing Tour	Sault Ste. Marie Sault Ste. Marie	Approximately 30-35,000/season 4-5,000/season	.Michigan Boat Tours carry about 100,000 passengers per season .boat and bus tours have high competition with similar operators in Sault Ste. Marie, Michigan because the American market stops there first before entering Canada .Americans must be encouraged to enter Canada directly .more coordination and cooperative promotion among operators is needed ----- .because of insurance problems/accident risks many tours have limited/scheduled tours only .increasing market interest but travellers are not aware of them; cooperation and packaging of attractions needs to be done
	Industrial Hardwood Timber Trail Weyerhaeuser (Ont.) Ltd. Tour Algoma Steel Tour Weldwood of Canada Ltd. Mill Tour Tour of Gold Mine Ranwick Uranium Mine Tour	Throughout zone	Presently small market	

*Primary Attraction - prime reason for visiting the area

**Secondary Attraction - only visited if already in the area

(continued)

TABLE II-2 (continued)

CATEGORY	ATTRACTION	LOCATION	TOURISM APPEAL	PROBLEMS AND IMPLICATIONS FOR DEVELOPMENT
Secondary Attractions (cont'd.)	Historical .Fort St. Joseph .St. Joseph Island Museum .Bruce Mines Cemetery .Bruce Mines United Church .The Old Stone House .The Norgoma Overnight Cruise Vessel .Mawa Goose .Marine Museum .Indian Medicine Cave .Agawa Indian Pictographs .49th Field Regiment Royal Canadian Army Historical Society Museum	Scattered throughout the zone	Only visited if already in the area .Market size varies with locations and type of attraction	.many are only partially developed and do not carry out themes to their entirety .historical attractions are so dispersed throughout the zone visitor is not made aware of their historical significance .new historical development should be located near existing historical attractions
	Educational .Sault Ste. Marie Canadian Locks and Canal .Tarentorous Fish Hatchery .Civic Centre .Great Lakes Power Co. Powerhouse .Provincial Air Service	Sault Ste. Marie	Increasing interest in educational attractions	.most visitors are not aware that these facilities are open to the public .locks and canal are the most popular of all the attractions in this category and they are in high competition with the U.S. locks and canal system .visitors must be made aware of these attractions through cooperation amongst operators
	EVENTS	LOCATION	TOURISM APPEAL	PROBLEMS AND IMPLICATIONS FOR DEVELOPMENT
	Bon Soo Winter Carnival	Sault Ste. Marie	Primarily local residents	.as presently organized will continue to have only local appeal .little promotion outside area is done .difficult to expand appeal because in direct competition with well established winter events such as the Quebec Winter Carnival
	Algoma Fall Festival	Sault Ste. Marie	Regional appeal	.competes with similar opportunities found in area where potential markets reside .could be expanded and tied in with Algoma Central Railway's Fall Colour Tours
	Maple Syrup Festival	St. Joseph Island	Regional appeal	.intervening opportunities - won't attract residents from southern Ontario or from the United States .should concentrate on appealing to northern Ontario market (i.e., Sudbury, North Bay)

There are several other small local events throughout the zone. The cultural/ethnic events should be encouraged to expand and appeal to a broader market; however, events such as 'Community Days' will likely remain to have local appeal but should encourage travellers already in the area to attend these events

The dining rooms/restaurants and evening entertainment available in Sault Ste. Marie attract day visitors from Sault Ste. Marie, Michigan and the surrounding area. Sault Ste. Marie -location at the American border results in sharing the attractions of Sault, Michigan such as the American Locks and the Tower of History. The cooperation is minimal between the two cities at present and more interaction would benefit both.

Sault Ste. Marie, although the focal point of the zone, lacks a major attraction for destination travellers. Although there are several secondary attractions, little co-ordination or packaging is done with these attractions.

Visitors to the Sault Ste. Marie-Wawa zone tend to stay for short time spans. Yet, many good opportunities exist; should visitors be made aware of them, lengths of stay would be increased. Better promotion and packaging efforts are required to maximize on existing attractions and events.

b. Accommodation -- The Sault Ste. Marie-Wawa zone has a variety of accommodation establishments.

TABLE II-3
ACCOMMODATION IN THE SAULT STE. MARIE-WAWA ZONE

CATEGORY	TYPE	NUMBER OF ESTABLISHMENTS	NUMBER OF UNITS/SITES CABINS/COTTAGES
Commercial	Licensed Hotels/Motor Hotels	34	1,400 approx.
	Motels	69	1,200
	Resorts/Camps	48	400
	Rental Cottages/Cabins	54	250
	Trailer Parks/Campgrounds	34	1,200 approx.
	Outpost Sites (Ministry of Natural Resources Sites Only)	45	
Non Commercial	Second Residences	4,453	
	Provincial Park Campgrounds	3	674

Close to 50 percent of licensed establishments are in Sault Ste. Marie. The motels/hotels in the Sault range from small to medium in size. Few offer recreation opportunities on site. The demand for accommodation indicates the city has an oversupply of hotel/motel units.* Further development should likely be discouraged for the short term. There does seem to be significant

*Refer to Appendix C for a more detailed description of accommodations - location, occupancy rates, problems and implication for development.

demand for housekeeping/self-contained units in Sault Ste. Marie. *

Outside of Sault Ste. Marie the majority of the accommodation establishments are resorts and rental cabins and cottages (Figure II-4). A high percentage of the resorts and rental cabins/cottages are east of the Sault, near Highway #17 on the many inland lakes. There are also a number of fly-in resorts north of Wawa. The main activities at these establishments are fishing, boating and some swimming. This narrow scope of activities limits market appeal. Resorts, both fly-in and road access, tend to be small compared to those in other areas in the province. Thus they cannot afford to expand or diversify the activity opportunities. There is also a tendency within the zone to do little upgrading of existing operations. As a result, a number of establishments are outdated or of poor quality. Operators need encouragement to upgrade as well as to diversify.

Besides the limited market appeal, few resorts in the zone are large enough to accommodate the bus tour market. Those operations that can have not pursued this market.

The zone's resorts/lodges have been reluctant in moving from American Plan to housekeeping/self-contained units. American Plan resorts do not compete well with other travel opportunities in a similar price range such as a trip to the Rockies or Europe. There are many reasons for the high costs of resort holidays, not the least of which is the cost of labour. Resorts must consider moving from the labour intensive American Plan to the self-contained units. Travellers today are looking for what are, or appear to be, methods of economizing.

The numerous small operations of rental cabins and cottages also need encouragement to upgrade. Run down, out of date operations are the rule rather than the exception. The state of present accommodation seems to have created a demand for new and more modern cabins/cottages. This is particularly so in the Wawa area and on St. Joseph Island. It should be noted that sites of new operations should be selected for their good swimming potential.

'Off-season' occupancy rates are poor throughout the zone. Minimal in-roads into the convention/conference and small meetings market have been made.

*Demand for housekeeping/self-contained units was expressed by the personnel who work in the Travel Information Centres (based on requests by visitors to the centres).

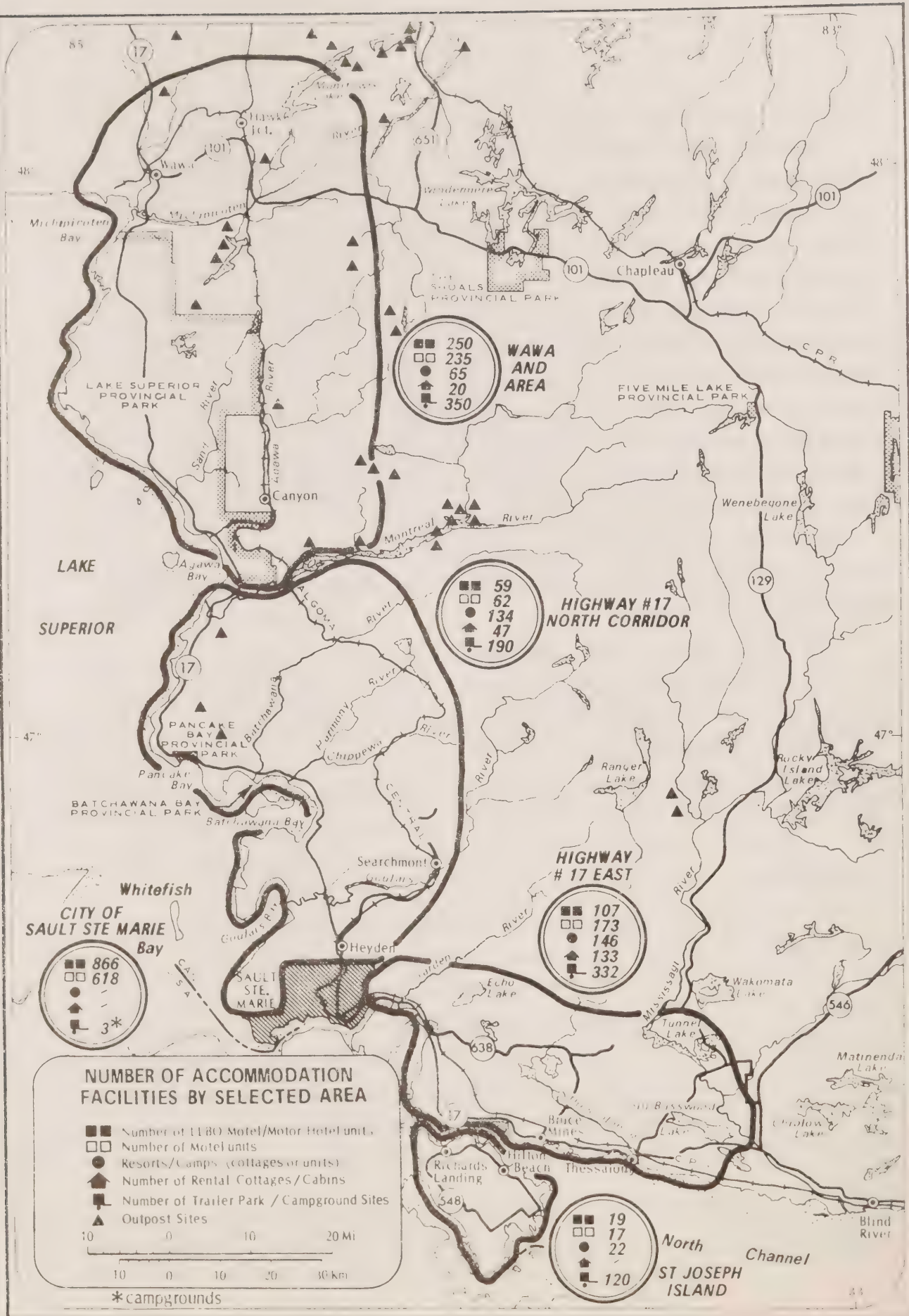


FIGURE II-4

In addition, few resorts have tried to capture winter recreation markets. There is potential for resorts to introduce winter packages. This especially applies to those near the Algoma Central Railway line, tying in with the Snow Train. At this point, the size of the winter market would suggest that only a few resorts should develop winter packages.

Second residences are a recreation component in the Sault Ste. Marie-Wawa zone. Users of second residences require similar services to travellers staying at commercial accommodations. Second residence users have needs for such services as grocery/food stores, auto service stations, hardware stores and marinas. Often they also take advantage of attractions and attend events. Second residence users provide a relatively stable, base market, offering substantial benefits to the tourism operations in an area.

There are nearly 4,500 second residences in the zone. Over 90 percent of these are within a sixty mile radius of Sault Ste. Marie. Twenty-three percent are owned by residents from outside Ontario. Three or four new cottage subdivisions are now being developed privately, and the Ministry of Natural Resources is investigating opportunities for second residences on Crown land. Demand for second residences is high, but it tends to be for the lower priced units with minimally serviced land.

c. Food Services -- Most restaurants/food services are found within the population centres. Sault Ste. Marie has an ample supply of food services. Dining facilities in the Sault are predominantly of Italian and Chinese cuisine. In fact, Canadian cuisine is available only in a few of the city's better hotels. Pricing structures appear to be competitive with other areas in Ontario.

In the Wawa area food services are somewhat limited. For the most part, restaurants are developed in conjunction with service stations. An atmosphere of fast food service rather than leisurely dining is evident. Those dining rooms/restaurants without service stations tend to lack quality and atmosphere. In addition, few restaurants in the Wawa area are large enough to accommodate bus tours.

Outside the two centres, food service facilities are usually associated with either service stations or roadside motels. Most are of the small restaurant type. Few are quality dining rooms. Many of the resorts accessible by car have dining facilities and should encourage the highway travellers to utilize their facilities.

The quantity of restaurants/dining facilities in the zone seems to be sufficient. The quality is another matter. Facility upgrading and theming need to be impressed upon the operators. The restaurant/food service industry is extremely competitive, high risk by nature. Minor quality changes in a few establishments can change visitors' perceptions of the quality of food services available. Presently, two major establishments are refurbishing in Sault Ste. Marie. This activity will improve the quality of food services available.

Not only is physical improvement necessary, employee upgrading must also be addressed. They are key sources of information to the travelling public. Restaurant personnel must be made aware of the attractions and tourism services in their area, in addition to providing better restaurant services. Their skill and enthusiasm in communicating contributes to increased tourism in the area and business for their establishment.

d. Information Services -- Information services are critical to the success of tourism in an area. Travel Information Centres are only one form, albeit the most visible to the traveller. In Sault Ste. Marie there are two information centres. The centres' locations create a number of problems. The Chamber of Commerce Centre, on Highway #17 North, is too far off the road and the number of signs on this road hide the centre. The Provincial Travel Information Centre at the foot of the International Bridge is also poorly located. Travellers coming off the bridge are concerned with clearing customs and quickly must decide on the direction to take. The location of both centres do nothing to encourage travellers to venture into the city's centre-- the centre of all the activity. In effect, travellers tend to quickly by-pass the city.

The zone's other information centres also have poor locations. In Wawa and Thessalon the visitor is required to exit off the main highway. The information centre for St. Joseph Island is located on Highway #17 East. It is difficult to stop there. Travellers are past the centre by the time they have determined where it is.

Information Centres can be a mechanism to set the theme of the area and offer the traveller information and ideas for additional travel opportunities -- opportunities which will enhance the travel experience, or that can be undertaken on a return trip. The centres can also depict

the type of travel experience to be expected in the zone. Little theming of the information centres has been done and so they fail to portray to travellers that the area is unique, special or exciting.

Once within the area, travellers need road sign directions to attractions and services. Many accommodation establishments outside the population centres have no or too few signs on the major highways or on access routes. Many of the existing signs are unattractive; so much so that they seriously detract from the travel experience along the corridors and access routes. Quality and more attractive road signs are in order.

e. Transportation Services -- The Sault Ste. Marie-Wawa zone has relatively good transportation services, compared to other areas in northern Ontario. The zone's major limitations are the distances and travel time from the major population centres in both Ontario and the United States. The time/distance constraint applies to all, except air travel.

TABLE II-4

DRIVING DISTANCE FROM MAJOR POPULATION CENTRES

Population Centre	Distance from Sault Ste. Marie
Detroit, Mich	341 mi.
Grand Rapids, Mich.	280 mi.
Chicago, Ill. (via Mich.)	444 mi.
Chicago, Ill. (via Wisc.)	477 mi.
Cleveland, Ohio	509 mi.
Toronto	423 mi.
Hamilton	459 mi.
Ottawa	492 mi.
Montreal	629 mi.
Thunder Bay	442 mi.
Winnipeg	866 mi.

For the visitor travelling by private automobile, good highway systems exist for both Ontario and U.S. residents. The four lane Interstate Highway #75 serves many population centres from Florida to Sault Ste. Marie, Michigan. The main corridor within the zone is Highway #17. This highway is part of the Trans Canada Highway route. The area benefits from a large pass-through market. The beautiful scenery along Highway #17 North itself attracts many visitors. Currently, too few scenic stopping points are along this route, and the Ministry of Natural Resources is investigating areas within Lake Superior Provincial Park to establish more stopping points. The proximity of Highway

#17 to Lake Superior does hinder driving in the winter months.

Outside of Highway #17 there are few other highways. This leaves the interior of the zone relatively inaccessible except by the few seasonal lumber roads and access roads to the smaller population centres and seasonal residence concentrations. The major appeal of the area is its wilderness. For this reason, the lack of road development is more of a benefit.

Within the Sault Ste. Marie-Wawa zone a number of potential scenic circular routes varying in length could be promoted. There are three good potential day trips and one overnight trip (Figure II-5). These circular routes would be based on the natural attractions which are on or close to the routes. The activity opportunities and man-made attractions would be included in the travel routes as well.

Traffic counts of the Ministry of Transportation and Communications provide general indications of tourism travel within the zone. The average summer daily traffic* on Highway #17 is about 6100 vehicles per day, 76 percent greater than the annual daily average. On Highway #17, between Wawa and Montreal River Harbour, traffic increases twofold in the summer months. Traffic volume is greatest on Highway #17 between Heyden and Desbarats in the Sault Ste. Marie area according to the statistics.

Vehicles crossing the International Bridge between Michigan and Ontario also gives additional information on tourism traffic. In 1975, 936,890** vehicles crossed the bridge. Approximately 50 percent of these crossed into Sault Ste. Marie, from Michigan. Over 63 percent of the bridge traffic occurred from May to September (1975). (This is consistent with previous years' statistics.)

Three air carriers serve the zone. Air Canada, Transair and NorOntair. Figure II-6 details the direct flights serving Sault Ste. Marie and also scheduled connecting flights (stopover time minimal). Sault Ste. Marie is also indirectly serviced by North Central Airlines, with daily flights from Chicago and Detroit to the Kincheloe Air Base in Sault Ste. Marie, Michigan.

*Summer Average Daily Traffic includes all vehicles, commercial and private (Refer to Appendix D for more detail)

**Includes commercial and private vehicles' there were about 3,000 commercial vehicles/month in 1975.

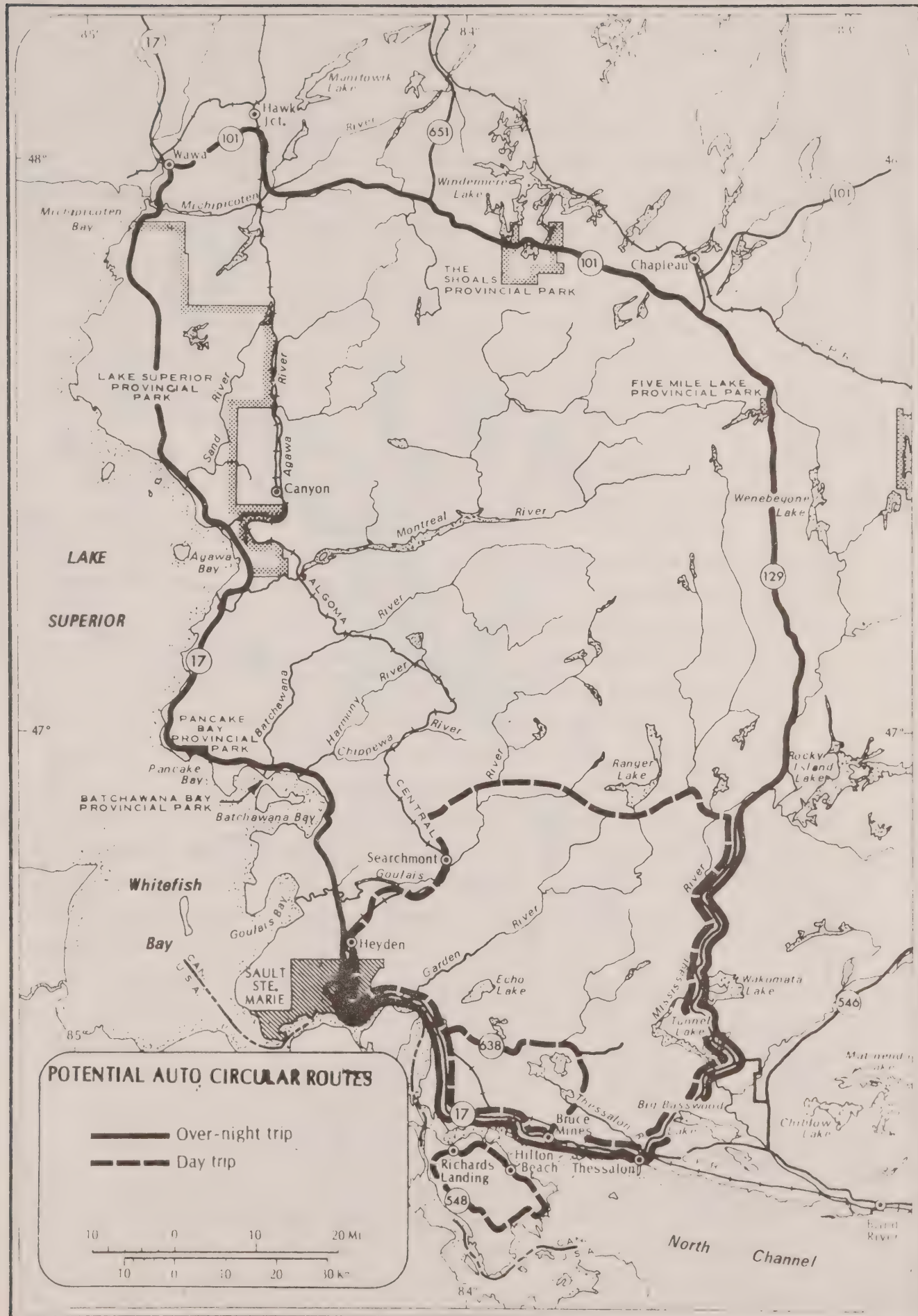
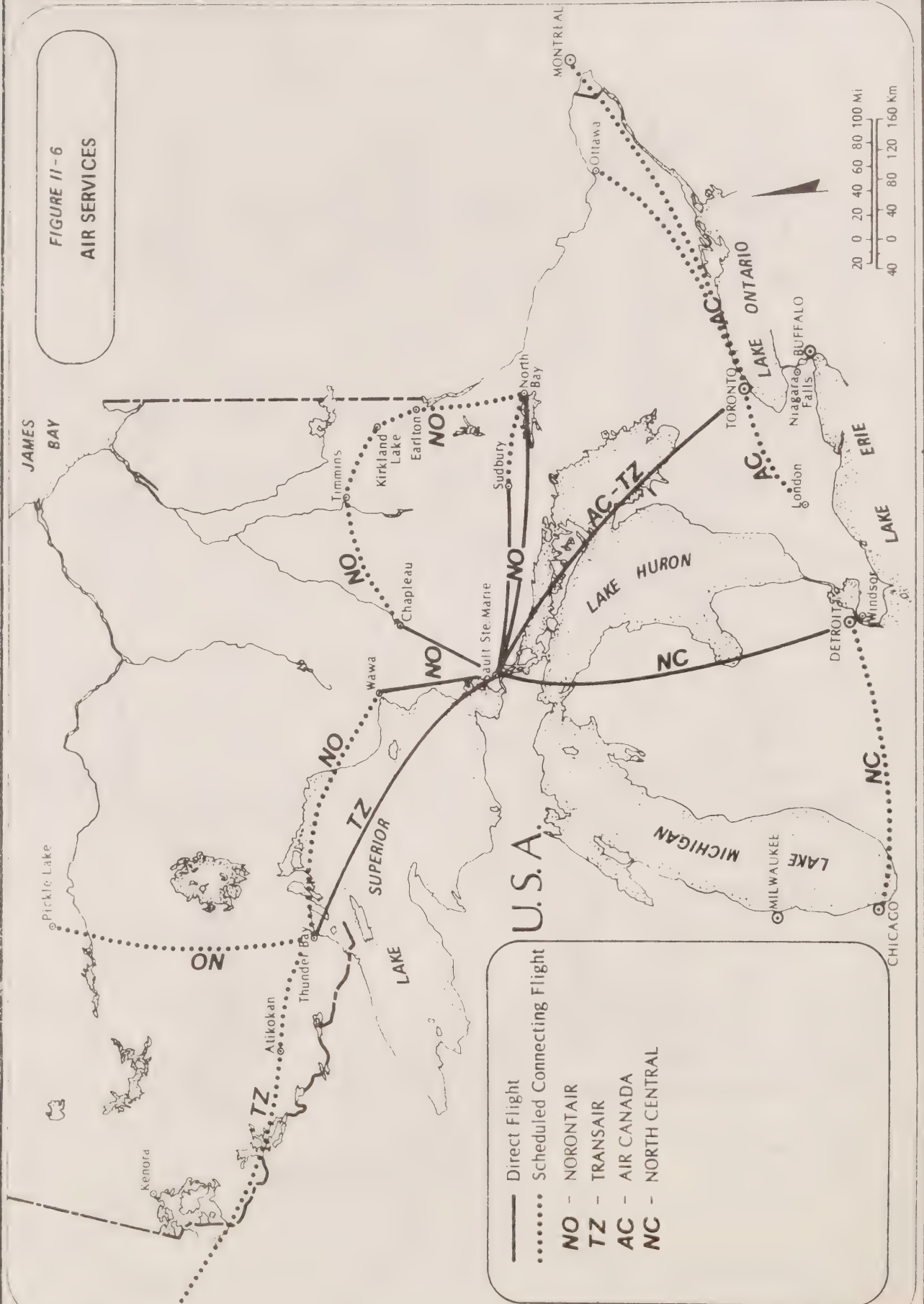


FIGURE II-5

FIGURE 11-6

AIR SERVICES



Direct air service from Toronto enables easy access to the zone for overseas travellers and from many U.S. population centres. Several direct flights originate from many of the Western Canadian cities to Winnipeg. Transair's connecting flights from Winnipeg to Sault Ste. Marie enables easy access from these centres as well.

Within the Sault Ste. Marie zone three private air carriers provide unscheduled chartered air service. Air-Dale operates from Sault Ste. Marie airport. Watson's Northern Skyways and White River Air Service have air bases in Wawa and Hawk Junction.

The American market is very important to the Sault Ste. Marie-Wawa area's tourism industry. Many operators in the zone express the desire that Sault Ste. Marie airport become 'International Airport'. As an international airport, both scheduled and chartered flights originating outside of Canada could then fly direct to Sault Ste. Marie. An alternative is to have regular scheduled flights from Windsor to Sault Ste. Marie aimed at the Detroit market in particular. However, short distance flights are undesirable to most companies and it is unlikely that any carrier will pick up this route. On the other hand, operators in the zone could work with chartered flight carriers in Windsor to improve air access for nearby American markets.

Access to the Sault Ste. Marie-Wawa zone by rail is limited. The travel time involved from the major market concentrations to the zone has proven to be a deterrent to using rail transportation. The zone is serviced by three rail carriers: the Canadian Pacific, the Canadian National and the Algoma Central Railway. Table II-5 on the following page details the rail service from selected Canadian population centres. Also noted are transfer points and stopover times at each point.

Rail travel is obviously not the most convenient, nor most accessible mode, for travellers from southern Ontario and eastern or western Canada. Sudbury is the only population centre with direct service. And the Sudbury route to Sault Ste. Marie has limited use, which has led to considering its discontinuance.

The Algoma Central Railway services the regional traveller, with three runs per week from Sault Ste. Marie to Hearst. Very few passengers use the service, and the company is interested in cutting back.

The Algoma Central Railway also operates a tour train from Sault Ste.

Marie to the Agawa Canyon. This is a major attraction, important to the zone's tourism industry. Regular tour trains run from mid-May to mid-October. The train tour has its greatest passenger business during the fall colour. A weekend 'Snow Train' also operates mid-December to the end of March.

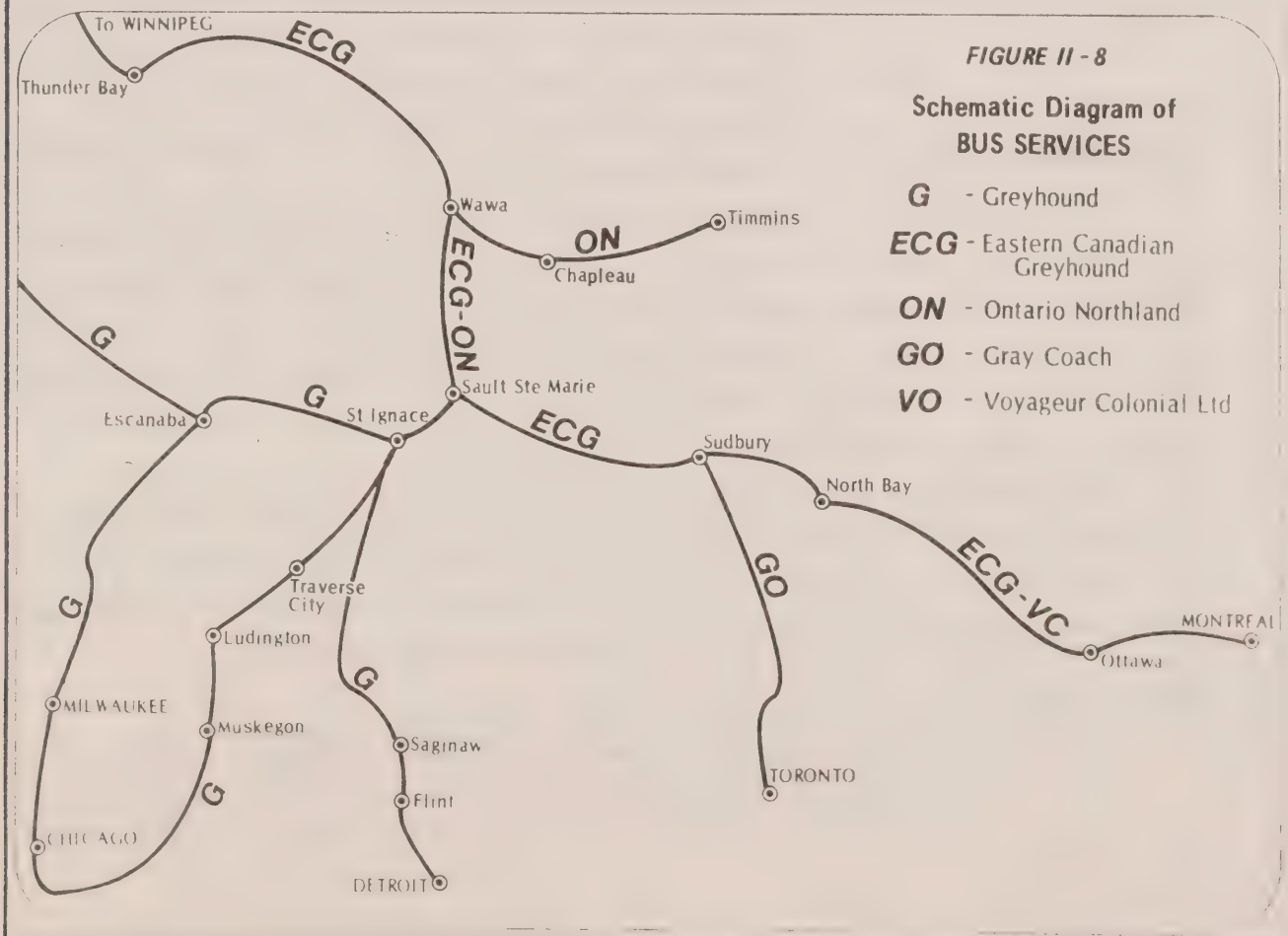
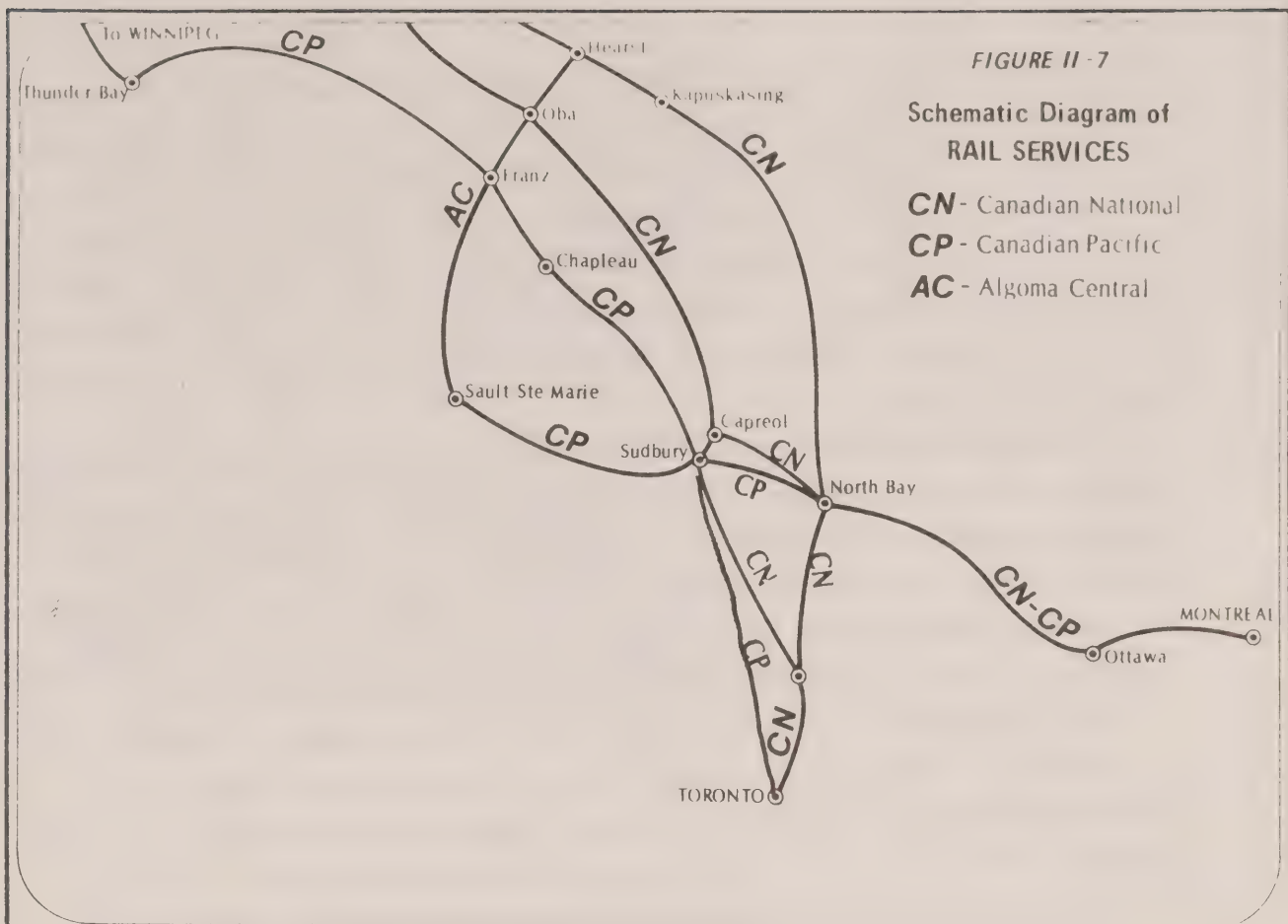
As rail service throughout Canada is cut back, this pleasure train ride can look towards increasing popularity and importance to the zone's tourism industry. It is, however, imperative that the train tour visitor has a good, memorable time for continuous success and attracting larger and more distant markets. Many of the travellers enjoy the train ride up to the Canyon to find the 'Canyon' limited in activities in which to participate. Many find the return train ride uninteresting. Clearly, more activity opportunities need to be provided both in the Canyon, and on the return train.

TABLE II-5
RAIL TO AND FROM SAULT STE. MARIE*

Carrier	Route	Length of Stop	Route	Rail Carrier
<u>To Sault Ste. Marie</u>				
CP	Winnipeg to Franz	Overnight	Franz to Sault Ste. Marie	ACR
CN	Winnipeg to Oba	Overnight	Oba to Sault Ste. Marie	ACR
CN	Winnipeg to Hearst	1 Day + Overnight	Hearst to Sault Ste. Marie	ACR
CP	Montreal to Sudbury	1/2 Day	Sudbury to Sault Ste. Marie	CP
CP	Toronto to Sudbury	Overnight	Sudbury to Sault Ste. Marie	CP
CN	Toronto to Sudbury	Overnight or 1 Day + Overnight	Sudbury to Sault Ste. Marie	CP
<u>From Sault Ste. Marie</u>				
ACR	Sault Ste. Marie to Franz	Overnight	Franz to Winnipeg	CP
ACR	Sault Ste. Marie to Oba	Overnight or 1 Day + Overnight	Oba to Winnipeg	CN
ACR	Sault Ste. Marie to Hearst	Overnight + 1/2 Day	Hearst to Winnipeg	CN
CP	Sault Ste. Marie to Sudbury	Overnight	Sudbury to Montreal	CP
CP	Sault Ste. Marie to Sudbury	Overnight	Sudbury to Toronto	CP
CP	Sault Ste. Marie to Sudbury	2 Hours	Sudbury to Toronto	CN

The zone is well serviced by commercial bus carriers (Figure II-8).

*Refer to Figure II-7



From centres such as Montreal, Ottawa, Toronto, Winnipeg, Detroit, Chicago and Duluth, transfers are required but stopover times are short. The long distances of these routes imply all day or all night travel on the bus. Although bus travel is increasingly popular, this trend will likely have little impact for the zone because of the time/distance constraint. Should the zone become a winter tourism area, however, bus travel could become more important as people often turn to alternative modes of travel for long distance winter trips.

With discussion on Canadian Pacific discontinuing rail service between Sudbury and Sault Ste. Marie, bus service will most likely replace the rail service. A direct non-stop bus schedule should be considered from Sudbury to Sault Ste. Marie to connect the 'Hostess Express' service from Toronto to Sudbury. This service would equate the bus time involved with private auto travel times in addition to being more relaxing and pleasurable.

Boat transport plays only a minor role in the movement of people. It is important in the tourism industry since travel by boat is primarily minimal compared to the existing pleasure boaters to the south on Lake Huron and east in the Manitoulin Island areas on the North Channel. Presently, the zone can claim few marine services, therefore making it difficult to capture the pleasure boating market (refer to Appendix D for existing services).

Two recent studies have produced several recommendations for marine development in the zone.* The City of Sault Ste. Marie is presently involved in the development of a full scale marina.

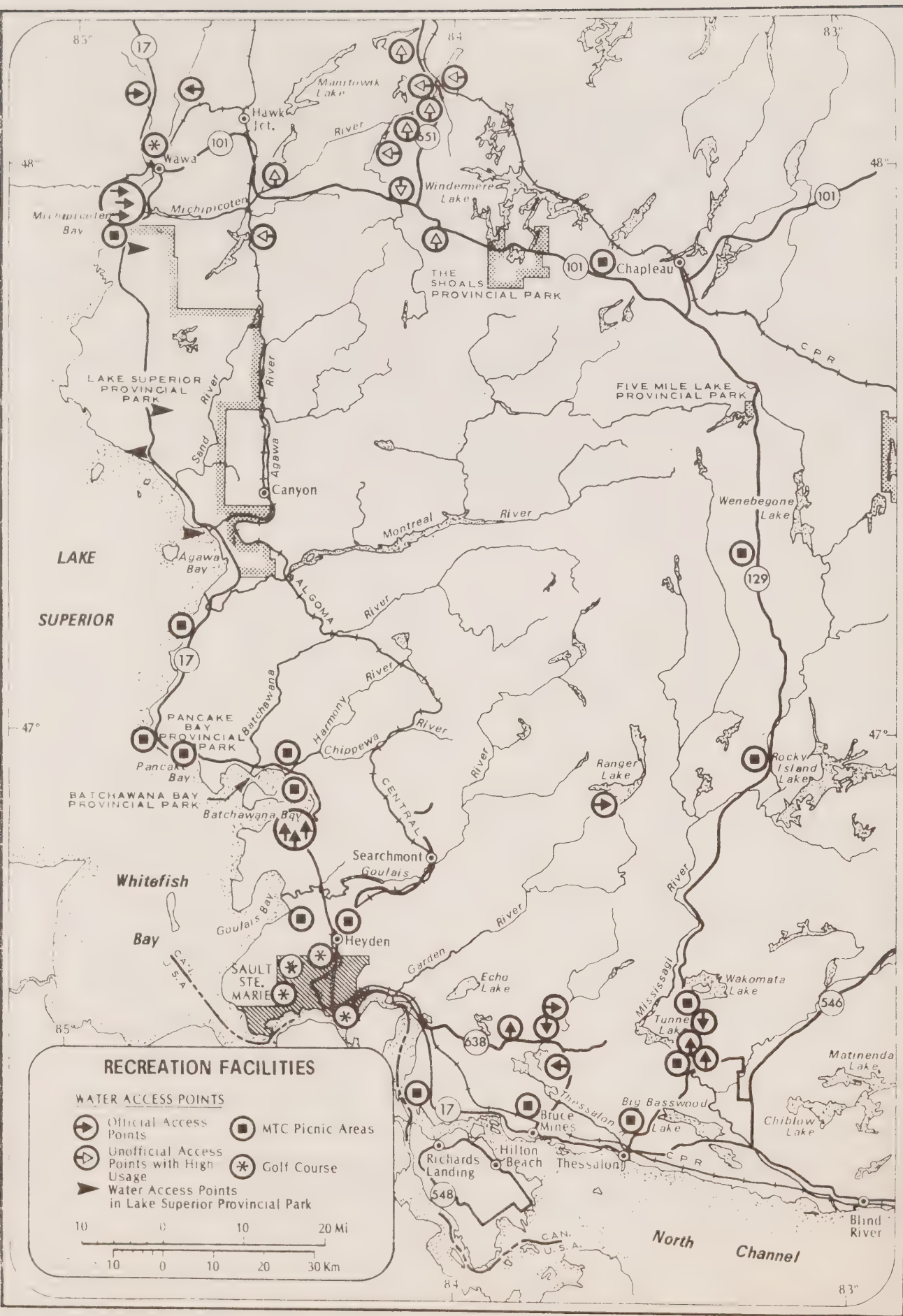
The reputation of the danger of Lake Superior has curtailed its use by pleasure craft. One of the studies mentioned above assessed that the lake provided good and safe boating for craft 20 feet and over.

The inland lakes can support small craft. These lakes are used primarily by canoeists and fishermen, and major marina facilities would not be viable because of the size and nature of the user markets.

There are two boat tour attractions operating out of Sault Ste. Marie. The trips consist of passing through the canal and lock systems and travel up to Whitefish Bay. Both trips are about two hours long, and in 1976 it was estimated that they collectively carried about 30,000 passengers.

*Refer to: 1. Hedlin Menzie & Assoc. Ltd., North Shore Lake Superior Recreation Study, Volume 2, Development Strategy, June 1974.
2. Ministry of Natural Resources, Northeast and Algonquin Regions, "The Georgian Bay-North Channel, Access Study", March 31, 1976.

f. Picnic Grounds, Boat Docks/Launches & Golf Courses--Figure II-9 details the location of these facilities. Picnic facilities provided by the Ministry of Transportation and Communications are located near the highway. The majority of these picnic areas are located along Highway #17 North and East. The water access points are developed and maintained by the Ministry of Natural Resources. There are six locations on Lake Superior with dock and/or boat launching facilities. The rest of these types of facilities are on interior lakes north of Wawa and east of Sault Ste. Marie, with the majority of the docks/boat launches road accessible. The unofficial access points do not have developed facilities, but do have regular garbage pick-up service. Additional water access points are proposed for the zone, particularly on the inland lakes north of the Bruce Mines/Thessalon area.



B. Markets and Market Potential

1. Market Overview

To identify development opportunities, one must first identify and understand the nature of present clients and determine potential clients, within the context of capitalizing on the resources available.

Tourism is important to the Sault Ste. Marie-Wawa zone. The most recent figures available are for 1973, but nonetheless reflect the tourism contribution to the zone's economy. In 1973, the area's 2.7 million visitors had expenditures totalling \$37.4 million. Over 60 percent of the travellers were Ontario residents. Almost 30 percent were from the United States, the remainder from other provinces (9%) and overseas countries. U.S. visitors accounted for \$17.04 million or 46% of total travel expenditures. Ontario's residents spent \$15.52 million with others spending \$4.88 million.

TABLE II-6
ORIGIN OF VISITORS TO THE SAULT STE. MARIE-WAWA ZONE 1973
(PERSON VISITS)

Origin	% Within Province/State	% of Total
Ontario		60
Northeastern Ontario	60	
Central Ontario	13	
Lake Erie	7	
Lake St. Clair	7	
Rest of Ontario	13	
United States		29
Michigan	74	
Ohio	7	
Illinois	3	
Pennsylvania	2	
Rest of U.S.	14	
Other Provinces		9
TOTAL		100

Source: Tourism Statistical Handbook 1975
Ontario Recreation Survey 1973-74
U.S. Auto Exit Survey 1973-74

TABLE II-7
TRAVEL EXPENDITURES (IN \$,000) RELATED TO ACTIVITIES
WITHIN THE SAULT STE. MARIE-WAWA ZONE

Selected Principal Activities	All Origins	U.S.	Ontario	Other Provinces
Sightseeing/Touring	\$10,431	\$ 5,467	\$ 2,700	\$2,264
Visiting Friends/Relatives	8,031	2,021	4,614	1,396
Outdoor Recreation/Visiting Own Cottage/Resort Vacation	6,907	5,342	1,043	522
TOTAL EXPENDITURES FOR ALL ACTIVITIES	\$37,440	\$17,040	\$15,520	\$4,880

Source: Tourism Statistical Handbook 1975 and Tourism Research Branch, Ontario Ministry of Industry and Tourism

A more specific breakdown of the travel patterns of various market groups follows:

Ontario Residents--Of the pleasure* trips which included at least one overnight stay in the zone, 93 percent had their main destination in the zone. The other 7 percent were passing through to other destinations.

TABLE II-8
ONTARIO RESIDENT PLEASURE TRIPS WHICH INCLUDED AT LEAST ONE NIGHT
IN THE SAULT STE. MARIE-WAWA ZONE

	Weekend Trips	Vacation Trips	Total Trips by Destination
Trips with Main Destination Sault Ste. Maria-Wawa Zone	85%	15%	93%
Trips Passing Through the Zone with Main Destinations Elsewhere	14%	86%	7%
Total by Trip Type	80%	20%	100%

Source: Ontario Recreation Survey 1973-74

The majority of the trips with main destinations in the zone were weekend trips (85%). This compared with pass through trips where 86 percent were vacation trips, only 15 percent being of the weekend variety.

*Does not include business trips. Industry business trips increases the number of pass through trips quite substantially.

The origin of Ontario visitors to the zone varies by trip type. Over 80 percent of the weekend trip visitors are from northern Ontario, while visitors from other Ontario areas comprise only 16 percent. The southern Ontario market increased substantially on vacation trips. Residents of the Sault Ste. Marie-Wawa zone comprise a large percentage of the visitor markets for both weekend and vacation trips.

TABLE II- 9
ORIGIN OF ONTARIO VISITORS BY OVERNIGHT PLEASURE TRIP TYPE

Origin	Number of Weekend Destination Trips (%)	Number of Vacation Destination Trips (%)	Vacation Pass Through Trips (%)
Northwestern Ontario	3.2%	3%	32.3%
Northeastern Ontario (excluding zone)	24.9%) 34%	0%
Sault Ste. Marie-Wawa Zone	56.3%		
Rest of Ontario	15.6%		
Eastern	2.2%	6%	67.7%
Lake Ontario	1.5%	--	
Central Ontario	4.4%	26%	
Niagara	--	--	
Lake Erie	3.7%	11%	
Lake St. Clair	2.2%	13%	
Midwest	1.5%	2%	
Georgian Bay	--	4%	
TOTAL	100%	100%	100%

Source: Ontario Recreation Survey 1973-74

What are the Ontario visitors doing in the zone? Approximately 54 percent of this market group are staying in the area for 2 nights or less. The average party size is 3.5 persons. Over 50 percent are staying at the home of a friend or relative. Other visitors are using hotels/motels (25% of all trips) or campground facilities (11%). Very few of the Ontario residents stay at a resort/lodge while visiting the Sault Ste. Marie-Wawa zone.* The mode of travel used most often is the private automobile.

*Source: Ontario Recreation Survey undertaken in 1973-74. Resorts in the zone reported a substantial increase in Ontario resident visitors in 1975 and 1976.

While in the zone, almost half of the Ontario visitor days are spent visiting friends or relatives (VFR).

TABLE II - 10
BREAKDOWN OF ACTIVITIES OF ONTARIO RESIDENTS IN
THE SAULT STE. MARIE-WAWA ZONE
(AS A PERCENT OF PERSON DAYS)

Activities	Weekend Trips (%)	Vacation Trips (%)	Average of all Trips (%)
Visiting Friends and Relatives (VFR)	55	45	49
Recreational Driving/Touring	8	13	11
Shopping	8	5	6
Motor Boating	4	6	5
Cottaging	9	1	3
Snowmobiling	2	4	3
Attend Spectator Sport	1	5	3
Fishing/Camping/Canoeing	6	9	9
Other	<u>7</u>	<u>12</u>	<u>11</u>
TOTAL	<u>100</u>	<u>100</u>	<u>100</u>

Source: Ontario Recreation Study 1973-74.

This large 'VFR' market has many implications for tourism development. Commercial accommodation is less used by this market group. Restaurants, attractions and shops/stores are the prime services demanded by the 'VFR' travellers. To encourage this market to stay in the area longer and to increase their expenditures, the resident population plays a key role. It must encourage friends and relatives to take advantage of the zone's attractions and services. The first step is increasing resident awareness.

Most other travel activities in the zone by Ontario residents have an outdoor recreation orientation. Recall that accommodation used by Ontario residents is hotels/motels 25%, and campgrounds 11%. The hotel/motel users are interested in an outdoor experience with most of the services/amenities of home. The campers, on the other hand, are looking for more rugged, natural outdoor recreation opportunities or inexpensive accommodation.

With 56 percent of the weekend trips and 16 percent of the vacation trips originating in the Sault Ste. Marie-Wawa zone, the resident market is obviously an important market to the tourism industry in the zone. It is also an important day trip market.

TABLE II-11
MAIN DESTINATION OF RESIDENTS OF
THE SAULT STE. MARIE-WAWA ZONE

Main Destination	Number of Weekend Trips	Number of Vacation Trips
Within the Sault Ste. Marie- Wawa Zone	48%	16%
Other Destinations	52%	84%
TOTAL	100%	100%

Source: Ontario Recreation Study 1973-74

Of all the overnight trips taken by residents of the zone, 17 percent are vacation trips, and those are quite important to the tourism industry in the zone. Table II-12 describes the activities of residents on all trips within and outside of the zone.

'Water oriented' activities are the most popular activities for residents on overnight trips. Residents tend to pursue water oriented activities outside the zone. A large number of the overnight trips are visiting a 'recreation home'. Other data sources show the majority of the second residences owned by the zone's residents are within a 60 mile radius of Sault Ste. Marie.

The zone's resident population constitutes the important stable base market for day use activities. Almost 90 percent of the day trips have destinations in the zone (Table II-13). The most popular activities, besides the community-based activities, are hunting, organized nature appreciation and swimming. These activities have direct implications for tourism development.

Hunters require equipment and, often, meals. And, as there are few swimming areas within the zone, a commercial development offering day-use swimming opportunities is likely to receive high visitation. Organized nature appreciation is usually provided by the public sector. Commercial opportunities, however, do present themselves through the provision of food and car services near provincial and community parks.

TABLE II-12
ACTIVITIES OF LOCAL RESIDENTS ON OVERNIGHT TRIPS

Activities	Activities Included	ACTIVITY DAYS BY DESTINATION		Number of Days by Activity Type	Comments
		Sault Ste. Marie Wawa Zone	Other Destinations		
Water Oriented	Swimming Boating Fishing Water Skiing	28%	72%	36%	Swimming had the largest participation for this group with twice as much participation outside the Soo zone as compared to inside.
Cultural	Historic Site Live Theatre Museum, Art Gallery Spectator Sport Annual Event	29%	71%	4%	Participation among these events was fairly equal
Outdoor Land	Hunting Hiking Org. Nature Apprec. Pers. Nature Apprec. Downhill Snowshoe & X-Country Snowmobile Picnic	28%	72%	10%	Picnicking and hunting were the two predominant activities in this category, while downhill skiing had minimal participation
Other	Rec. Driving Cycling Golf Tennis Camping Rec. Walking Tobogganing Basketball Bocce Alley Bowling Track & Field Judo, Karate	36%	64%	22%	Camping was the predominant activity in this category
Visit Recreation Home		Almost 100%		28%	Data collection procedure does not enable a breakdown by destination. Analysis of cottage ownership shows that there are over 3,000 second residences within a 60 mile radius of Sault Ste. Marie owned by local residents
TOTAL		50%	50%	100%	

*Without 'visit recreation home' activity days included, only 30% of the activities took place in the Sault Ste. Marie-Wawa Zone.

Source: Ontario Recreation Study 1973-74

TABLE II-13
ACTIVITIES ON DAY TRIPS BY RESIDENTS OF THE SAULT STE. MARIE-WAWA ZONE

Category	Activities Included	Within the Zone	Other Destinations	Number of Days by Activity Type	Comments
Water Oriented	Swimming Boating Fishing Water Skiing	97.8%	2.2%	12.6%	*Swimming has the most participation in this group and most likely a large percentage takes place in indoor pools.
Cultural	Historic Site Live Theatre Museum, Art Gallery Spectator Sport Annual Event	99.7%	.3%	9.8%	*Spectator sport represents 81.1% of this total participation.
Outdoor Land	Hunting Hiking Org. Nature Apprec. Pers. Nature Apprec. Downhill Snowshoe & X-Country Snowmobile Picnic	60.8%	39.2%	14.4%	Hunting, the event most actively done, constitutes 35.2% of these activity days and organized nature appreciation is second in importance.
Recreational Driving		72.3%	27.7%	10.6%	
Recreational Cycling/ Walking	Recreational Motorcycle or Bicycle, Walking	97%	3%	18.3%	Recreational walking is 63.7% of this category.
Sports Oriented Both Indoor and Outdoor	Football, Skating, Hockey, Tobogganing, etc.	Almost 100%		34.2%	Tend to be community based activities.
TOTAL		89.7%	10.3%*	100%	

*Does not include sports oriented activities

Source: Ontario Recreation Survey 1973-74

American Travel Market--The United States resident is of prime importance to the tourist industry of the Sault Ste. Marie-Wawa zone. Americans contribute the most to the tourism account. When the zone's residents are not included in the total number of visitors, 7 of 10 visitors to the zone were American (findings in the summer of 1970 and the spring of 1972, according to two separate studies). The majority of these United States visitors entered Canada by the International Bridge.

In 1976 a large decrease in American visitors was noticed. To many, this decrease came as a surprise. However, statistics of the Travel Information Centre across from the International Bridge show a steady decrease in U.S. visitation over the last five years. No single reason can be isolated, yet obviously a number of factors are having a negative impact on the American tourist. Many hypotheses are offered for the decline: inflation, Ontario's uncompetitive prices; the energy costs; the inhospitable treatment by custom officers at the border, and so on. It becomes necessary to appreciate the need to provide a unique, exceptional experience to visitors if this trend is to be reversed.

Without the American market, the zone's tourism industry would have difficulty sustaining itself. The southern Ontario market still perceives the travel distance as being too great and the population base of northern Ontario is too small to support the existing plant.

Of the United States residents travelling to this area, practically 85 percent are coming because of the natural resources; scenic features, lakes, fish and wildlife.

TABLE II-14
MAIN REASON FOR VISIT BY AMERICAN RESIDENTS

Main Reason:	
Tour Ontario Countryside	41.1%
Outdoor Recreation	14.3
VFR	12.7
Ontario Resort Vacation	8.4
Attend Special Events	4.0
To Stay at Own Cottage	3.0
To Shop	3.0
Other*	13.5

* Other: Defined as Business Reasons, Commuting to Work.
Source: U.S. Auto Exit Survey 1973-74

The activities they participate in further delineates the characteristics of the tourists attracted to the zone.

TABLE II-15

MAIN ACTIVITIES PARTICIPATED IN BY AMERICAN AUTO VISITORS	
Activity	Party-Days %
Attend Special Event (includes Agawa Canyon Tour Train)	26.8
Fishing	17.1
Motor Boating	13.3
Swimming	12.9
Specialized Shopping	6.2
Nature Study	5.5

Source: U. S. Auto Exit Survey 1973-74

The outdoor, nature-oriented experience desired by the American market varies from visitor to visitor. The same proportion of visitors stay at hotels/motels/resorts (23%) as those who camp (20%). The great influx of American visitors with fully-equipped motor homes demonstrates the growing desire for the experience of a serviced, almost luxurious view of the natural resources.

Almost 53 percent of American visitors are day visitors only. Of the extended visitors, over 60 percent stay in the zone three nights or less. The average party size of American visitors was 3.15 persons. Visitation by Americans is more concentrated into the summer months in this zone than in the rest of the province. Nearly 50 percent of the visitor parties come into this area in July and August. Most visitors to the zone are in the 12-19 and 45-64 age categories, and the travelling party tends to be families with children (41%) and couples (14%).

Other Travel Markets--Little recent information exists on travel characteristics of residents from other Canadian provinces and overseas visitors. Operators in the zone thought tourists from Quebec and Manitoba to the area increased in the past few years. The majority of these visitors appear to be of pass through type, spending a maximum of 2 nights in the zone. Overseas visitors visit primarily to see friends and relatives (particularly those from the European countries and the British Isles).

Summary of Current Markets--The Sault Ste. Marie-Wawa zone's share of provincial markets has decreased over the last five years. Fewer American visitors are coming to the zone, while a slight increase of visitors from southern Ontario and other provinces has been reported. Travellers are also spending less time in the area. In 1974 the majority of visitors stayed in the zone three nights or less, reflecting, in part, the large pass through traffic. Yet, even the destination trips are short. It would appear that many visitors perceive the area as a weekend trip destination rather than a vacation destination spot. Others see it only as one destination of many in a touring oriented vacation trip. The majority of visitations occur in the summer months. The 'shoulder' seasons receive some visitation, but travel to the zone in the winter months is minimal..

The zone's appeal relates to either the natural resource base or to visiting friends or relatives. The zone's position on the Trans Canada Highway provides a substantial business travel market, most of which is en route to other destinations.

The group composition of the visiting parties tends to be families* with children, or couples. A large number of visitors in the 65 and over age category is noticed particularly in the fall for the Agawa Canyon Train Tour. The zone receives a very small proportion of the single youth or young adult market (19-30 years).

Of the activity opportunities afforded in the zone, the Agawa Canyon Train Tour, scenic driving and fishing receive the greatest amount of participation. Staying at 'own cottage' is also a major activity for residents from northern Ontario and some from the United States.

The average party expenditure in this area is less than the provincial average, likely because of the high percentage of day visitors and short trip duration travellers.

*The Family Travel Market is significant only because of the resident population taking trips within the zone and the proximity of Sault Ste. Marie, Michigan, from where families take day trips into the zone.

2. Potential Markets

Tourism projections imply that more vacation and weekend travel will be to destinations closer to home. Rising energy costs will likely further this trend. Already, effects are shown by the decreasing number of U.S. residents visiting Ontario. The 'Balance of Payments' of the tourism account is so poor in several countries that governments are placing restrictions on travel. (The recent United States government move limiting the number of tax deductible conventions outside of the country is a good case in point.) Canada's tourism Balance of Payments is also a concern.

Target Markets by Origin--The southern Ontario market is expected to become more important to the zone with heavy advertising aimed to encourage 'seeing your own province first'. This market group still perceives the distance to northern Ontario as being too great--a perception that must be changed or overcome. Southern Ontario travellers will continue to visit the zone primarily on vacation trips only.

The U.S. market in the past has contributed the greatest amount to the tourism revenue account. Decreases in the number of U.S. visitors has been noticed over the last five years. This trend must be reversed. Unlike the Ontario residents, Americans do not perceive distance as being as great a constraint.* Michigan, Ohio and Illinois are the states with the greatest potential.

Recent studies of the overseas market travel patterns conclude that travel to northern Canada is a desired vacation experience. The native Indian population is of interest to overseas visitors. The Sault Ste. Marie-Wawa zone can accommodate both motivations. Germany has been identified as a northern Ontario tourism market group. With 25 percent of the population of Sault Ste. Marie being of Italian background, Italy provides another good tourism target market area; although this market will primarily be 'visiting friends and relatives'.

*Identified by operators within the zone.

Visitors from other Canadian provinces currently pass through the zone rather than stopping. This pattern will likely continue unless more development occurs in the zone.

Potential Market By Activities--An investigation of trends showed that it is expected that bus tours will increase in popularity. The Agawa Canyon Tour Train will attract more tours. However, unless more opportunities are provided, the travellers on buses and the Train Tour will continue to stay less than 2 nights in the zone.

The 'specialty market' defined as individuals or groups with specific interests is a rapidly emerging market group, and the Sault Ste. Marie-Wawa zone has a number of attractions which could appeal to these specialty markets (e.g., geology, painting and photography). The applicable attractions and support services must first be packaged if the zone is to effectively attract the specialty markets.

Family travellers are currently not a large market group. There are few opportunities in the zone for swimming and visiting amusement attractions, the basic activities of a family vacation. Although family units are smaller, trend information shows families are taking more trips. Promotion and development activities should respond to the family market's needs.

The Sault Ste. Marie-Wawa zone offers few attractions for the single adult market. Tourism developments such as Club Mediterranee are successfully capturing much of the young single adults market. The zone as a tourism attraction has minimal penetration into this market group, characterized by long distance trips of 1 and 2 weeks. The real appeal for this market group is the social orientation of the travel experience.

Travellers today can essentially fall into two relatively distinct categories--the 'big spenders' and the 'economizer'. The demand for luxurious, fully serviced, expensive vacations persists. High quality resorts providing numerous opportunities and all the urban amenities are prime tourism attractions. On the other hand, campgrounds are filled and economy motels and hotels are thriving, for the most part. The increasing demand for self-contained accommodation further attests to the 'economizer' traveller group.

The population is taking more weekend trips and are splitting up their vacation time, but more economical holidays are being sought. Accommodation facilities falling between the luxurious and the economical are being, and will likely continue to be, used less.

C. Intervening Opportunities

Competition for travel markets is fierce. Tourism as an industry is recognized as being if not the biggest, the second biggest industry by many provinces and states throughout the North American continent. All are competing for the same markets--the large population centres. Large promotional programs have been done introducing many new travel opportunities. The historical development of transportation modes has greatly influenced the travel opportunities. The automobile and the building of new and better highways opened up many new hinterlands and provided a wide range of destinations. Air transport has broadened the tourist's potential choice even further. A weekend trip to any North American city becomes a possibility, while the choice for a vacation trip is virtually limitless.

How does an area compete? Offering a product at a lower price, providing a unique experience and having better and varied attractions are functions of competition. To identify the means of putting the Sault Ste. Marie-Wawa zone into a more competitive position, it is necessary to understand why 'potential' markets are currently not travelling to the zone. What, in fact, are the tourism opportunities lying between market origins and the zone?

The markets with the greatest potential for the Sault Ste. Marie-Wawa zone are the major urban centres on the Great Lakes system (Toronto, Detroit, Chicago, etc.). Between the zone and the southern Ontario population, numerous opportunities are available. The resort areas of the Muskokas, Haliburton and Huntsville/Parry Sound capture a large percentage of the southern Ontario market during the summer months. Those intervening areas are receiving greater winter use with winterizing of cottages and the increasing interest in snowmobiling and cross country skiing. These areas also contain several downhill skiing resort areas within 60-100 miles of the large population in Metro Toronto and area. These areas are predominantly resort-oriented and second residence, but they also have a good mix of historical and amusement attractions.

Land is becoming scarce in these areas and now, what land is available is extremely expensive. New second residence and resort development is consequently pushing northward. The increasing interest in nature and wilderness settings is forcing people to travel greater distances into northern Ontario, as the intervening areas are becoming overcrowded.

The State of Michigan has been very active in developing tourism facilities. Numerous historic forts have been restored, and other historic sites have been preserved. There are a number of year-round resort opportunities capitalizing on skiing in the winter and water activities during the summer months. The State of Michigan has also provided a number of camping and boating opportunities at State Parks, State Forests and Game Areas. The intervening opportunities available to the traveller interested in camping, resorts, cottaging, winter activities, amusement and historical attractions are, therefore, numerous. Even the hunter and fisherman are well provided for as a result of conscientious game and fish management programs.

Not only is the Sault Ste. Marie-Wawa zone competing with the intervening opportunities in Michigan and Ontario but also with overseas, western and eastern Canada trip opportunities. In many instances, an individual can visit Europe or the Rockies for a cost similar to what he would pay for a fly-in resort in the zone. Packaged tours and ABC flights are able to reduce their prices so much that the tourism industry is going to have to struggle to compete.

To compete on a 'price' basis, the Sault Ste. Marie-Wawa zone must offer activity opportunities which involve minimal capital and operating costs, such as backpacking, auto camping, canoe tripping and other outdoor recreation opportunities. These opportunities are relatively inexpensive to the traveller. Unfortunately, they also have a history of being low revenue generators. To be competitive and at the same time increase revenue, the Sault Ste. Marie-Wawa zone has the task of offering a mix of unique experiences and opportunities. The inexpensive opportunities must be provided along with the high revenue generating opportunities described in detail in Chapter V.

Currently, the zone is losing in the tourism market because of its lack of development. The beautiful shoreline of Lake Superior and rugged topography of the inland area are spectacular. Yet, few opportunities are readily available for the traveller to experience them. The zone has Ontario's highest elevations and the potential to provide longer and better downhill runs than both Michigan and the rest of Ontario. The historical and cultural mix in the zone is another valuable, but slightly developed resource. The lack of development of these unique resources is hindering the zone's competitive posture. It is this very same lack of development which is the zone's major appeal. New development must be sensitive to the 'appeal'. A uniquely balanced mix of activities could maintain this appeal while broadening the market appeal.

D. Existing Operators' Attitudes and Desires

The tourism industry in the Sault Ste. Marie-Wawa zone experienced a poor year in 1976. This was the result of a dramatic, although predictable, decrease of American visitors. Summer travel to the zone peaked for an eight week period compared to previous years when the summer peak season was for ten weeks. Success of those operators who had relatively good seasons in 1976 is attributed to their high repeat-visit clientele. Operators are now starting to realize they must clearly assess their operations and create new opportunities to attract more visitors.

Meetings were held with a number of the zone's tourism operators to first, identify concerns and issues, and second, to formulate a list of development needs for existing operations.*

Those interviewed were asked to express opinions of all the operators within their sector of the tourism industry (attractions, various types of accommodations, restaurants, etc.).

The zone's tourist operators suffer from many of the problems typical to the province's entire tourist industry--seasonality, management problems, industry fragmentation and shortage of capital funding, to name a few. The zone suffers because it is a full day's drive from large sectors of the travel market. It is necessary for operators to cooperate and promote a 'total experience' to attract a sizable distant destination market. This means that operators must recognize that they are interdependent, that it is to everyone's advantage to sell together rather than separately by individual establishment or activity. Lack of cooperation is a problem, with serious impact on individual operations and the zone's tourist industry. This lack of cooperation is also reflected when travellers are already in the area. Few operators are encouraging their guests to visit other attractions and explore the entire zone.

Current operators have put too much emphasis on hunting and fishing. As these resources are being depleted and increasing government regulations are enforced, those operations offering only hunting and fishing will suffer. Their future success will depend on their ability to diversify and to appeal to a broad range of markets.

*Tourism operators interviewed were selected by the Regional Tourism Development Consultants, Tourism Division, Ontario Ministry of Industry and Tourism.

Many operators are reluctant to offer commission and credit card services. Travel agencies and tour wholesalers are being used much more frequently by the travelling public. Potential business will simply be lost unless operators are willing to pay agency commissions and accept credit cards.

The following table describes problem areas which were repeatedly reported by operators within the Sault Ste. Marie-Wawa zone.

TABLE II-16
PROBLEM AREAS IDENTIFIED BY TOURISM OPERATORS

Problems	Percentage of Operators Who Reported It Being a Problem	Percentage of Operators Who Did Not Feel It Was a Problem
Seasonality	60%	5%
Area Lacks Major Attractions	60%	
Operators Don't Understand Interdependency	50%	
Operators Have Insufficient Business Background	40%	
There is a Shortage of Trained Manpower	40%	
Lack of Interested Investors	25%	

Other concerns expressed by tourism operators are:

- i) Accommodation rates are not competitive, but are difficult to reduce because of sales tax and the high labour costs;
- ii) Customs officers at the Canadian border do not appreciate the value of the tourism industry. Their method of treatment of visitors is discouraging travel to the zone;
- iii) The International Bridge toll is too high, thereby restricting the number of day visitors from Sault Ste. Marie, Michigan;
- iv) Operators and banks are inconsistent in their U.S. dollar exchange rates. This has discouraged spending by Americans in the zone;
- v) The Ministry of Natural Resources has shown insufficient sensitivity to the importance of fish and wildlife to the zone's tourism industry. More resources should be devoted to management programs.

These problems are those expressed by existing operators, but new investors should be well acquainted with them also.

Operators were asked to identify development needs and opportunities. Several operators mentioned specifically that new development must be sensitive to the natural/wilderness appeal of the area and that development should maintain and enhance the uniqueness and charm of the 'Northern Communities'.

The opportunities that were suggested tended to be smaller scale and related to their individual needs. Emphasis was placed on developments to extend operating seasons. Several suggested more winter activity opportunities. They also felt more business and convention promotion was required. More and larger special events were also identified as means to expand the tourism season.

Other development suggestions responded to problems with current markets. A major destination attraction was desired to keep the high volume of pass through traffic in the area longer. Operators perceived that this major attraction would also help extend the length of stay of destination travellers who have tended towards shorter trips. A major appeal of the zone has been its fish and wildlife. Tourism operators felt new development should respond to broadening this appeal, thereby attracting new market segments.

These suggestions and problem areas show that operators, both new and existing, must engage in long term planning. Currently, local operators are only concerned with today. Every operation should have a scheduled maintenance and upgrading program. New and existing operators must collectively work together.

E. Population - A Resource and Its Attitudes

Towards Tourism Development

Population is a major factor influencing many aspects of development. An investigation of demographic trends, including changes in population size, geographical distribution and population structure is a prerequisite to planning for development. Human resources relate to tourism in a variety of ways.

In terms of the tourism industry, the resident population has a three-fold function. It provides the human resources for developing/promoting tourism. It provides the human resources to supply the ancillary services in tourism service centres and destination areas. It provides the human resources, whose ethnic and cultural lifestyles and activities form the themes for attractions and events, which attract visitors.

The Sault Ste. Marie-Wawa zone has a relatively small permanent population of about 108,000 (Statistics Canada, 1971). This resident population can serve not only as a market for the zone's tourism industry, but also as a primary target for 'awareness-raising' of the zone's tourism opportunities. However, slow population growth is expected as outmigration trends to southern Ontario continue.

Populations are highly concentrated in urban centres. In 1971, 83 percent lived in Sault Ste. Marie and in the communities on Highway #17 East. The urban centre of Sault Ste. Marie had a population of 80,332, or 74 percent of the zone's total population. Wawa, the only other sizable centre, has a current population just over 5,000. The remaining towns scattered through the zone all have less than 2,000 people. Rural outmigration to urban areas is expected to continue, thus predicating more severe localizing of population.

A shift towards an older average age for the population is characterized throughout the zone. Between 1961-1971, the percentage of the population in the 45-64 and 65 and over age groups increased markedly. This trend is greater in rural areas and smaller towns (e.g., Thessalon, Hilton Beach, St. Joseph Island), likely a reflection of the migration of younger people to urban centres. The actual number of people in the 15-44 years category more than doubled in Sault Ste. Marie between 1961-1971, with most other sections of the zone having a decline in the 15-44 age group.

The majority of the zone's working population is employed either in primary industry (e.g., mining, lumbering, commercial fishing, agriculture), or in secondary manufacturing industries based upon the zone's primary

extractive industries, while in the Highway 17 North area, about 74 percent are employed in these industries. Nearly 50 percent of the working population in the Sault Ste. Marie area is engaged in secondary manufacturing. In the Highway 17 East corridor area, manufacturing, including construction and wholesaling, and the retail trade are the major employers.*

The tourism industry is also a significant employer within the zone. The existing summer orientation of tourism contributes to seasonal fluctuation of the labour force.

In 1971, less than 40 percent of the potential female working population was employed, indicating a large untapped labour pool for the tourism industry.

1. Implications for Tourism Development:

The actual size of the permanent population limits the zone's ability to develop and maintain attractions and events and to supply necessary support services. Large scale attractions, designed to draw visitors over long distances, always rely heavily on a sufficiently large resident population for attendance and support. The zone's small resident population tends to preclude the economic viability of such large scale attractions.

The population concentration and the age composition create important implications for the zone's tourism development. The heavily populated areas (e.g., Sault Ste. Marie, Wawa and the southeastern section of the zone) logically become the sites for the larger man-made, cultural and historical attractions, while the less densely populated areas, such as the Highway #17 North area, remain relatively undeveloped with the natural environment as the major draw.

The level of tourism-related services is also a function of population concentration. Large service centres can offer more diversified and specialized services. Sault Ste. Marie is a case in point. The ongoing gravitation of the population to the zone's larger centres, particularly Sault Ste. Marie, indicates that the spatial imbalance in the level of services and the location of services will increase.

Tourism is a labour intensive industry and much of the labour employed is part-time, seasonal and low status. Use of the growing group of retirement

*Source of employment statistics: M.N.R. Directory of Statistics and Data for Incorporated Communities in the Northeastern Region, April 1975.

aged persons and the sizable untapped female labour pool can help to meet tourism labour requirements. Student labour is difficult to draw to the zone's tourism industry, as higher wages can be obtained in the primary or manufacturing industries.

Throughout Ontario, the tourism industry suffers from a scarcity of suitable managerial and skilled personnel. This shortage of qualified tourism personnel is evident in the Sault Ste. Marie-Wawa zone. This is a factor which can deter capital investment in tourism. It should be recognized also that tourism developers and operators in the zone's sparsely populated sectors have difficulties in obtaining both skilled and unskilled labour.

2. Historical/Cultural Aspects of Population:

People are a major factor in motivating travel by providing the basis for numerous attractions. A majority of travellers seek a social experience with the local populace. People travel to experience differing lifestyles and cultures, and to discover and observe a population's historic development.

The zone's ethnic concentrations have retained their cultural identities. They create a living environment, offering excellent tourism appeal. Although the zone's population is largely of British descent, there exists relatively large concentrations of people of French, native Indian and Italian origin. There are five Indian Reserves in the zone. People of Italian origin comprise nearly 25 percent of Sault Ste. Marie's population. Other active cultural groups in Sault Ste. Marie include the Finns, Croatians, Estonians, Lithuanians, Latvians, Germans, Austrians, and Belgians.

Tangible evidence of the zone's ethnic culture are exhibited through architectural styles, costumes, food, art and crafts, and even transportation modes. All these help the basis for attractions and events. They offer the ethnic and cultural themes to give a unique flavour to recreational experiences in the Sault Ste. Marie-Wawa zone.

Historical remnants of various human endeavours, and historical landscapes, buildings and structures also provide the foundation for attractions and themes, to enhance the recreational experience.

3. Resident Perceptions of Tourism Development:

Traditionally, there has been concern about the environmental and economic impacts of tourism development. The need to measure social impact has been recognized only recently. In order that the tourism industry may be expanded and further developed in a manner which minimizes possible negative social impact, it is necessary to understand the nature of the resident population and their attitudes toward tourism development activities.* It is necessary to understand:

- a. how the population currently interacts within its environment;
- b. the resource that the population represents;
- c. the nature of change that would allow the integrity of the nature of the community's identity to remain intact.

The residents of the Sault Ste. Marie-Wawa zone see themselves, their communities and their environment as a depletable resource. They are anxious to find ways of supplementing their current economic base through tourism development. They caution that the industry must be carefully developed in order to maximize the advantages for the residents, as well as for the visitors. The kinds of tourism developments that interest the overall resident population are generally those which would provide them with expanded opportunities. (Such opportunities tend to take the form of local community recreation and leisure development rather than commercial tourism developments .)

Certainly, the residents who have a direct financial interest in tourism are concerned about diversifying the tourism opportunities beyond current wilderness use and about the general upgrading of tourist facilities and services. Those with little direct contact with the industry are willing to accept tourists as a fact of life (but are concerned with maintaining their lifestyle). Furthermore, since the area residents perceive

*Ten Citizen Workshops were held by the consultants; 6 in Sault Ste. Marie, 2 in Wawa, 1 in Bruce Mines/Thessalon and 1 in Desbarats/St. Joseph Island.

the tourism area as their recreation base, they are concerned both from a personal and economic perspective about the depletion of the wilderness resource. It is generally felt that the provincial government should take a strong stand in the protection of the natural environment, and that controls must be developed to provide protection.

There is a general consensus that the development of attractions, events, activities, facilities and services in the zone's communities would make them more attractive to both visitors and residents. Residents believe the provision of more attractions in the communities would alleviate some pressure from the natural environment. The historical and cultural resources should form the basis of some of the new development.

Neither residents nor tourists demonstrate great awareness of the area's historic resources. Residents agree that their historical and cultural heritage, particularly the northern way of life, needs to be recognized, interpreted and developed as a theme for attractions, events and to provide atmosphere. Residents feel that the tourism plant should be designed to encourage interaction between local residents and visitors.

All of the concerns expressed by the residents indicate that they perceive the establishment of controls to regulate tourist travel and activity as a necessity. Without such controls, residents fear that their major resource, the natural environment, would be lost or destroyed, that future potential revenues would be gone, and their lifestyles and the quality of community life threatened.

F. Land Ownership and Planning Jurisdictions

There are a number of agencies, public and private, which have taken on planning responsibilities for large areas within the Sault Ste. Marie-Wawa zone. In most instances, the mandate for planning is assigned to public agencies and has a legislative basis. This is the case in the Sault Ste. Marie and Suburban Planning Area, the Sault North Planning Area, the Township of Michipicoten, St. Joseph Island and Echo Bay Planning Areas and in Lake Superior Provincial Park (Figure II-10). The Algoma Central Railway, which owns considerable land within the zone, is also involved in planning its territory for administrative purposes (Figure II-10).

The City of Sault Ste. Marie and its suburban area, the Sault North area, the Township of Michipicoten, St. Joseph Island and Echo Bay have been officially designated as planning areas under the provisions of the Planning Act. Official Plans for these areas are in various stages of completion.

The Official Plan of the Sault Ste. Marie and Suburban Planning Area received ministerial approval in October 1969. It is based upon studies which demonstrate the need for various forms of land use to meet with expected growth and development to approximately 1985. Its purpose is to direct or influence the growth in the manner which will best serve the common interests of the entire community. The Official Plan includes land use, community housing and urban renewal, thoroughfare and phasing plans and an implementation strategy which describe the approach with which the Planning Area intends to achieve its goals. Additional planning studies, the "City Centre Study" (Murray V. Jones and Associates, 1973) and the "Waterfront Development Study" (M.M. Dillon Ltd., 1976) have been commissioned to provide more detailed planning guidelines for these specific areas in Sault Ste. Marie.

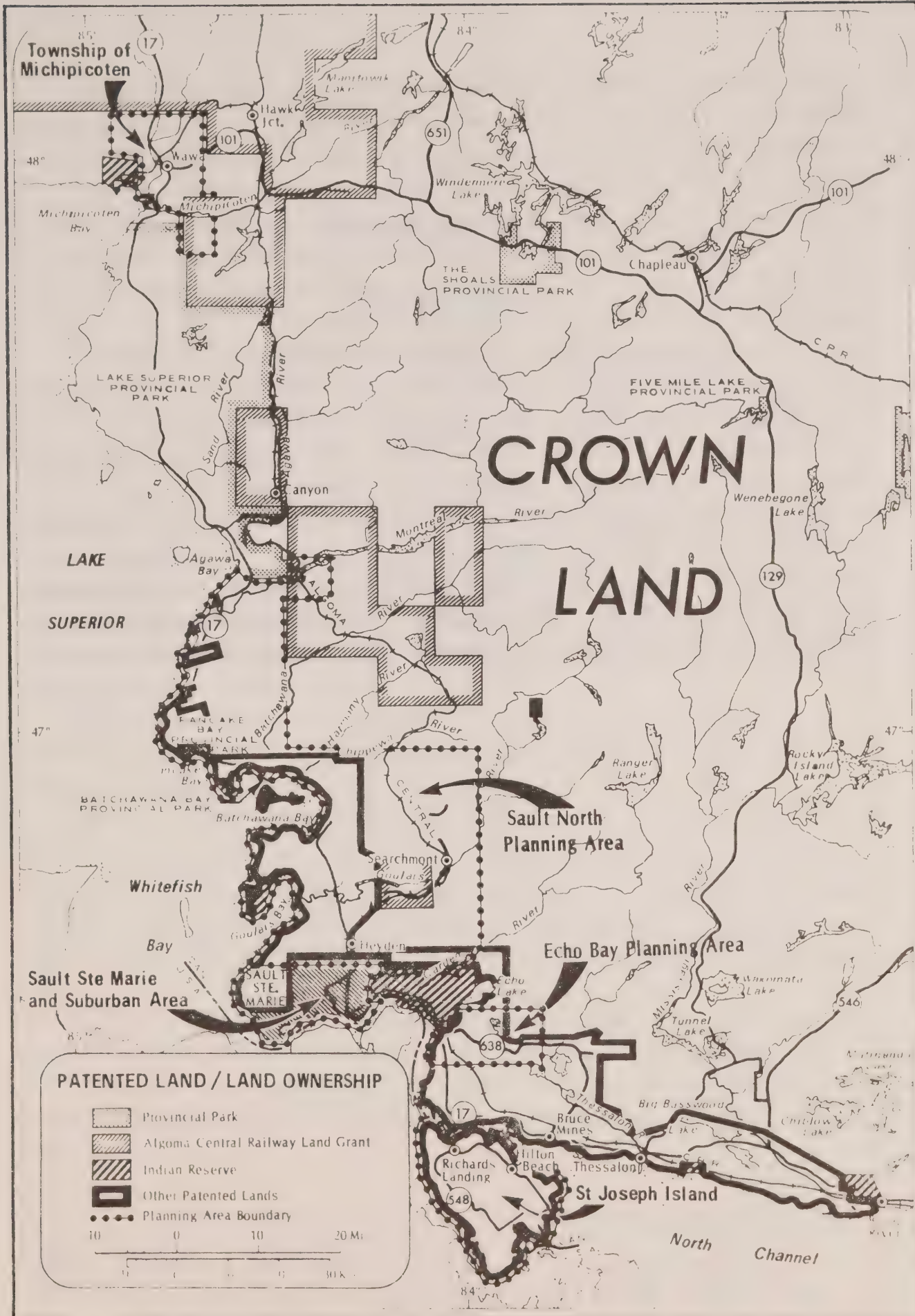
The Sault North Planning Area encompasses approximately 1,000 square miles of land, the majority of which is undeveloped (Figure II-10). In this area, ecological considerations and the integrity of the natural environment are accepted as high priority planning objectives. As a result of urban growth pressures due to the expansion of the Sault Ste. Marie population, local growth pressures from smaller communities within this area and pressure for resource utilization (e.g., recreation, lumbering), development control regulations have been implemented through restricted area orders

(i.e., Section 17 of the Public Lands Act - Ministry of Natural Resources and Section 32 of the Planning Act - Ministry of Housing). While these development control measures are currently still in effect, the report on planning and development policies for Sault North (June 1975) indicates that the provision of an Official Plan for this area offers distinct improvements over the restricted area approach. The Sault North has since received ministerial approval as a planning area (January 1976) and the draft Official Plan is expected to be completed by late 1977. It is hoped that the Sault North Planning Area will eventually be designated as an organized municipality in order that the restricted area orders can be terminated. This would place the Sault North under local administration, eliminating the necessity of applying to Queen's Park for approval of proposed developments.

The Township of Michipicoten Planning Area includes Wawa. The Official Plan for this area received ministerial approval in July 1972. Although the Township is heavily committed to the mining operations within its current boundary, it seeks to diversify its economic base, looking to tourism as an alternative. The Official Plan is intended to guide future development in this direction through the establishment of plans, policies and implementation schemes.

St. Joseph Island is a joint planning area with the Township of St. Joseph being the designated municipality (Figure II-10). Its Official Plan was approved by the Minister in December 1973 and applies to the entire Planning Area, which consists of four municipalities: the Townships of Jocelyn, St. Joseph and Hilton and the Village of Hilton Beach. This Official Plan is a general outline which is expected to guide the development of the four municipalities over the ensuing 20 years. The maintenance of the unique rural character of the Island is a primary concern, particularly in view of anticipated development pressures due to the Island's recently emerging role as a resort and recreation destination and as a dormitory community for the greater Sault Ste. Marie area. The Plan is dedicated to providing the Island's residents with a maximum of rural amenities in an economically productive environment.

The Ministry of Housing is preparing the Official Plan for the Echo Bay Planning Area (Figure II-10). This plan is expected to be completed in the near future.



The Ministry of Natural Resources administers all Crown Land, but the most detailed, large scale planning project in the Sault Ste. Marie-Wawa zone is the Master Plan for Lake Superior Provincial Park. It is classified as a Natural Environment Park which, under the Ontario Parks Classification System, represents landscapes of outstanding aesthetic or historic significance, and is established primarily for recreation and education. The park covers about 600 square miles, including the waters of Lake Superior, for a perpendicular distance of 1 mile from shore (Figure II-10). The Master Plan is expected to define recreational opportunities and land uses within the park and to reconcile these with other existing, but potentially conflicting, land uses (e.g., lumbering, mining, commercial fishing).

The Algoma Central Railway (A.C.R.) owns a great deal of land within the Sault Ste. Marie-Wawa zone (Figure II-10). This agency currently permits the public to use their land for a variety of recreational purposes and leases property for cottage development. The A.C.R. also leases timber rights on its territory. The agency is conducting a land use planning program which reviews the lumbering and recreational activities occurring on A.C.R. territory with the purpose of planning the future allocation of land resources.

CHAPTER III

DEVELOPMENT OBJECTIVES

A. Summary of Assets

The Sault Ste. Marie-Wawa zone has many attributes which make it attractive to visitors, and hence, to tourism development. The most outstanding assets of the area are its physical and human resources, and its historical development.

The spectacular scenery of the Lake Superior shoreline is a visual attraction unlike any other in Ontario. The varied topography of the shoreline area lends itself to many recreational activities, extensive and intensive. This area, in fact, is one of only four in the province rated with high capability for intensive use.* In addition to scenery viewing, the area also provides good fishing, hunting (especially for moose), boating, hiking, canoeing, and cross country skiing.

The zone contains the highest terrain in Ontario. Although undeveloped, these hills could provide better and longer runs than any other Ontario or Michigan ski area.

The zone's water resources are also significant tourism assets. The North Channel has excellent boating capabilities, yet only a marginal amount of boating activity is evident. Legendary Lake Superior (Gitchgomee) has been assessed as having good boating potential in a recent study.** And numerous smaller inland lakes offer a variety of water-oriented recreational opportunities.

The lack of development in a large percentage of the zone provides the opportunity for a wilderness experience serviced by a variety of amenities. The 'wilderness' can be experienced by a broad range of markets, from the canoeists and backpackers to those who just want to view the wilderness but not actually participate in it.

*Ontario Government. Ministry of Natural Resources. Strategic Land Use Plan for Northern Ontario. Background Information. 1975.

**Hedlin Menzies and Associates Incorporated. North Shore Lake Superior Recreation Study, Volume 1, Physical and Economic Studies. Toronto, 1974.

The numerous cultural and ethnic groups could become a significant resource to the zone's tourism industry. Within Sault Ste. Marie alone, there are 15 distinct cultural associations. There are 5 Indian Reserves in the zone, most notably the Batchawana and Garden River reserves. These native people and cultural groups could participate in tourism through events, food services and the sale of crafts. The native peoples, together with the wilderness experience, are especially interesting to overseas travellers.

The Sault Ste. Marie-Wawa zone is rich with history as it played an integral role in the development of Northern Ontario. The new Ministry of Northern Affairs will possibly bring renewed emphasis to the zone's historic significance. Little has been done to develop the zone's potential historic attractions. Yet, the numerous structural remains portraying the zone's history and the history of the individual communities, offer good potential for both attraction developments and historic theming.

The man-made attractions in the area, though few, do draw large numbers of visitors to the area. The Agawa Canyon tour train and the Seaway Canal and Lock system, which is shared by both Ontario and Michigan, are the major attractions. On a smaller scale, the resorts act to attract both American and Ontario residents to the area. The numerous other smaller man-made attractions, if packaged with the major attractions, would heighten tourism appeal, as well as help lengthen the stay of the visitor to the zone.

Transportation services to and within the Sault Ste. Marie-Wawa zone are relatively good for a northern area. The Trans Canada highway passes through the zone benefiting the zone with a large pass through market. Interstate 75, which stretches from Florida to Sault Ste. Marie, Michigan, provides excellent road access from large U.S. centres. The southern Ontario market, increasingly important to the zone's tourism industry, is serviced by direct flights from Toronto by Air Canada and Transair. The overseas market has easy air access to the zone, as only one transfer is required at Toronto International Airport.

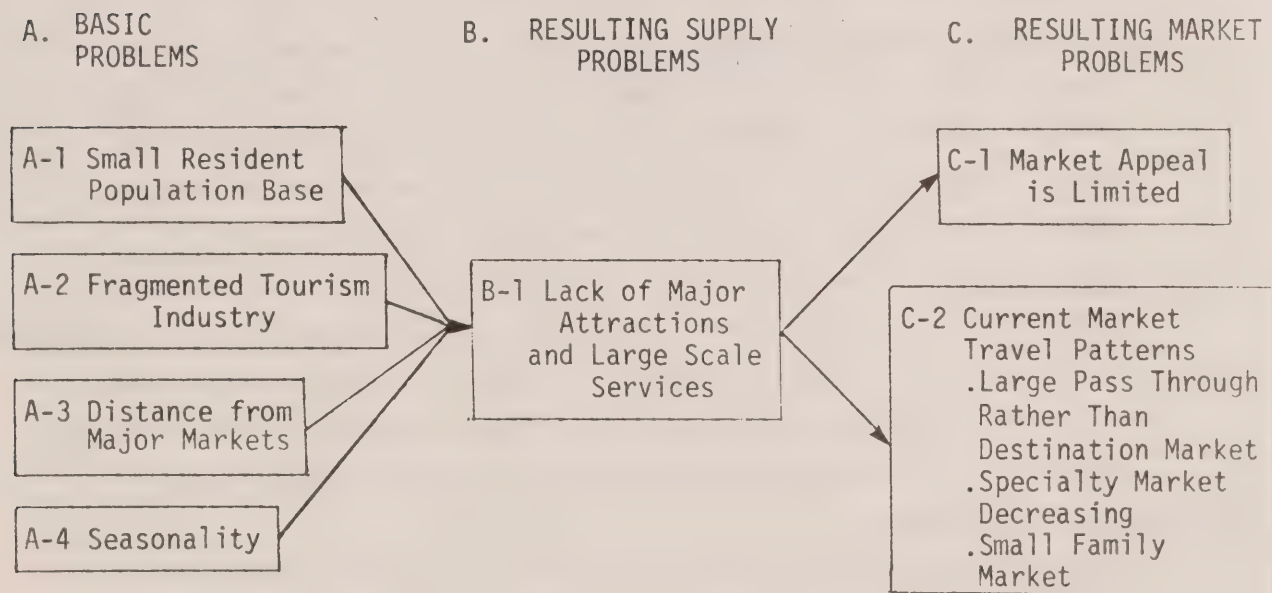
The positive attitude towards tourists and tourism development by most residents is another advantage to the tourism industry. These assets do offer good potential to enhance and expand the zone's tourism industry. Yet it should be emphasized that unless the zone's development problems (detailed in the next section) are overcome, these assets cannot be capitalized on to their fullest.

B. Summary of Problems

Like most other areas of the province, the Sault Ste. Marie-Wawa zone has a number of tourism development problems. These problems extend beyond physical development into areas of management, marketing, packaging, etc. The chart below outlines the essential problems which exist. These problems must receive considerable attention in the planning of the zone's tourism development. Unless they are dealt with adequately, new investment in the tourism plant is likely to diminish.

FIGURE III-1

Tourism Industry Problems in the Sault Ste. Marie-Wawa Area



The problems in the Sault Ste. Marie-Wawa zone are all interrelated. It is impossible to totally isolate one problem from the others. The following more detailed discussion on problems makes apparent these interrelationships.

Basic Problems

- A-1 Small Resident Population Base -- The total zone population is approximately 100,000 and is concentrated in Sault Ste. Marie with a population of 80,000 and Wawa with a population of 5,000. The small local population limits the resident market for enterprises as residents are an important market segment as users of most enterprises, especially those operating year round.
- A-2 Fragmented Industry -- Operations within the zone are small scale and usually have a single purpose. The management capabilities of operators are limited and they don't understand their interdependency with other facilities. Many support operations (e.g., service stations) don't understand their role in tourism.
- A-3 Distance From Major Markets - The closest major markets for the zone are all over 300 miles away (e.g., Detroit, Toronto, Chicago, Ohio). There exist several intervening opportunities closer to these major markets. The zone has a small weekend travel market. There is a higher dependency on vacation travellers.
- A-4 Seasonality -- The zone lacks a winter market. The services and facilities tend to be summer oriented. The 'shoulder' season visitation is decreasing. Depletion of fish and wildlife and government regulations are reducing the hunting and fishing market. Rising energy costs are increasing the sensitivity to long distance travel.

Resulting Supply Problems

- B-1 Lack of Major Attractions and Services -- Existing attractions are small scale. The few larger attractions (e.g., The Agawa Canyon Train Tour) tend to keep visitors in the area for a maximum of 2 to 3 days. Accommodation establishments are small to medium in size and few are developed to be attractions in themselves.

Resulting Market Problems

- C-1 Tourism Appeal Limited -- The current appeal of the zone is its natural resources, which afford such opportunities as viewing, hunting, fishing and camping. Existing developments do not do a good job at attracting visitors of all ages or varying skill levels.

C-2 Current Market Travel Patterns -- There is a large pass through travel market. The fishing and hunting specialty market is decreasing because of the depletion of fish and wildlife. The family market to the zone is small. The one large market for the zone, the visiting friends or relatives market usually have low expenditures. The zone has a small weekend market. Destination travellers to the zone stay an average of only 2 to 3 days. Little visitation occurs during the winter and 'shoulder' season months.

C. Likley Future If Development Trends Don't Change

To realistically evaluate the zone's assets and problems, they must be viewed in a future context. A review of the future gives some direction as to what industry conditions will be required to maximize the zone's assets. This process can sometimes also introduce new assets currently not perceived as such. The problems of today may not be the problems of tomorrow. An investigation of future trends aids in reinforcing the importance of existing problems and in prioritizing them.

An extensive review of related literature was undertaken to identify trends (Table III-1). These future trends were then related to the zone to: 1) evaluate how well the existing tourism plant could respond to forecasted changes in travel patterns, and 2) predict what the zone's future markets will be like if changes are not made.

Table III-2 is a summary of probable future changes in the current markets' travel patterns. Clearly, development trends must be counteracted.

TABLE III-1

FUTURE OUTLOOK FOR TOURISM DEVELOPMENT IN THE SAULT STE. MARIE-WAWA ZONE
IF PRESENT PROVINCIAL TRENDS CONTINUE UNINTERRUPTED

TRENDS	IMPLICATIONS FOR SAULT STE. MARIE-WAWA ZONE
<p>.Emphasis on summer vacations, will slowly diminish with subsequent increase during the shoulder seasons and winter months</p>	<p>.Slight increase in visits during shoulder seasons, mainly for visiting friends and relatives, fishing and fall colour tours. Volume of winter visitation will remain the same.</p>
<p>.With increased age group of over 65 and the retirement age lowering, there will be a greater demand for packaged vacations</p>	<p>.An increasing number of visitors will be on packaged vacations .Slight increase in attendance on Agawa Canyon train tour</p>
<p>.Demand for simple, low cost, seasonal facilities will increase. Also an increased demand for resorts and catered vacations (i.e., luxury, restful holidays) will become evident (result of increased percentage of population in the labour force).</p>	<p>.Inability to capture greater market groups due to a scarcity of inexpensive facilities, and a lack of major luxury resorts within the zone.</p>
<p>.With more population in the middle-income bracket, demand for services qualitatively and quantitatively will increase, resulting in:</p>	<p>.Increased number of campers in provincial parks and commercial campgrounds .Potential for more boaters into the area but lack of marina services</p>
<p>-increased demand for economy in these services -increased use of recreation vehicles (campers) -increased demand for 'family camps', 'recreation farms', boating holidays, etc. -increased demand for package tours, especially for the aged -increased demand for 'specialist' package tours such as naturalist, historical, archeological, theatre tours, etc.</p>	<p>.Increased number of packaged tours into the area for/by naturalist, archeological groups; most expenditures occurring in Sault Ste. Marie and Wawa where accommodation facilities are large enough to service groups</p>
<p>.Greater importance on individualism; increased demand for wilderness type recreation--canoeing, backpacking, mountaineering, etc.</p>	<p>.Increased number of campers/self sufficient travellers reducing expenditures made in the zone</p>
<p>.With increased leisure time an increase in mini-vacations (3 to 4 days) and also more long vacations (3 to 4 weeks)</p>	<p>.Slight increase in number of travellers into area</p>
<p>.Energy/fuel prices continue to rise, resulting in more small cars, more use of other modes of travel, but private automobile will continue to be predominant</p>	<p>.Weekend travel markets primarily from northeast Ontario and upper Michigan (i.e., short distance weekend market) .Area will be predominantly a vacation trip area .Relative increase in destination markets and decrease in pass through market</p>
<p>.Operating expenses will increase in areas of: .Personnel .Food .Maintenance .Energy</p>	<p>.Decrease in number of small operations and remaining establishments will be economy/self-service/housekeeping types and single destination urban and resort areas producing variety of opportunities</p>

TABLE III-2

PROBABLE FUTURE CONDITIONS (IN FIVE TO TEN YEARS)

IF CURRENT DEVELOPMENT TRENDS CONTINUE WITHOUT MAJOR INTERRUPTION

LIKELY FUTURE CONDITIONS

CURRENT SITUATION

- | | |
|---|---|
| <p>1. Origin of markets</p> <ul style="list-style-type: none"> .largest market is Ontario resident .second largest is U.S. resident .however, Ontario market is predominantly from northeastern Ontario | <ul style="list-style-type: none"> .gradual increase in visitation from southern Ontario .U.S. market continues to increase but not at same rate as southern Ontario |
| <p>2. Activities in order of importance:</p> <ul style="list-style-type: none"> a) visiting friends/relatives b) recreational touring c) Agawa Canyon train tour d) fishing and other outdoor recreation activities e) cottaging | <ul style="list-style-type: none"> .visiting friends/relatives as a percentage of total activities may decline .recreational touring will increase in size but decrease relative to destination travel .the train tour will have increased importance to tourism in the area .fishing and other outdoor recreation activities will increase .more non-zone resident ownership of second residences |
| <p>3. Types of overnight accommodation used</p> <ul style="list-style-type: none"> Home of friends/relatives 40% Own cottage 10% Hotel/motel 25% Resort/lodge 2% Tent/tent trailer 11% | <ul style="list-style-type: none"> Stable to slight decrease 35% Increase to 15% Remain stable at 25% Stable at 2 - 3% Increase to 15 - 20% |
| <p>4. Main destination of visitors</p> <ul style="list-style-type: none"> 30-50% pass through zone to other places in Ontario primarily 50-70% destination in Sault Ste. Marie/Wawa zone | <ul style="list-style-type: none"> Increase in total number of pass through visitors 35-55% pass through 45-65% destination |
| <p>5. Tourism appeal of zone natural resource oriented</p> | <ul style="list-style-type: none"> Appeal will continue to be natural resource oriented |
| <p>6. Season of travel is predominantly summer</p> | <ul style="list-style-type: none"> Summer predominantly, with marginal increase during the 'shoulder' seasons |
| <p>7. Population base in area is approximately 108,000 (viewed in the context as being a user group)</p> | <ul style="list-style-type: none"> Resident population growth rate will be slow |

D. Local Perspective

The need for changes in the existing tourism industry was indicated both in discussions with key tourism operators in the zone and in the workshops with resident focus groups.* Conditions for change were, however, outlined by both the operators and residents.

TABLE III-3
CONDITIONS FOR CHANGE

EXISTING PRIVATE SECTOR* (Obtained from interviews with current tourist operators)	1-1	New development should complement existing operations.
	1-2	The wilderness/natural resource appeal of the area should be retained and enhanced with new development.
	1-3	Existing attractions and events should be upgraded and expanded.
	1-4	Development should maintain existing community atmosphere and appeal.
	1-5	Development must be sensitive to the natural resource base (fish, wildlife).
	1-6	Development should aid in extending the tourism operating season.
	1-7	Development should be a means of encouraging visitors to stay in the area longer.
	1-8	Development should provide the means of attracting new markets into the area.
RESIDENTS* (Obtained from intensive- interaction workshops with resident focus groups)	2-1	Tourism development must also respond to resident needs.
	2-2	Development should enhance the community.
	2-3	Community improvement is necessary to attract and retain tourists.
	2-4	Historic resources should be recognized, developed and interpreted.
	2-5	Tourism should not result in excessive resident/tourist competition for fish and game.
	2-6	Tourist travel and activity within the area must be regulated and controlled.

*Refer to Sections D & E in Chapter II for further elaboration of these conditions.

E. Goals and Objectives for Tourism Development in
The Sault Ste. Marie-Wawa Zone

There are two overall provincial goals for tourism development.

These are:

1. To increase the volume and diversity of tourism opportunities throughout Ontario, and
2. To increase the quality of the tourism experience in Ontario.

The preparation of goals for tourism development in The Sault Ste. Marie-Wawa zone were designed to be in keeping with these provincial goals while responding to specific concerns and needs of the zone.

To formulate the goals and objectives the following process was undertaken:

- i) an assessment of the zone's current assets and problems;
- ii) identification of development changes required to counteract probable future conditions;
- iii) identification of the local resident's perspectives to minimize negative social impacts of tourism development; and,
- iv) identification of existing zone operators' perspectives recognizing they play a major role in tourism development.

Table III-4 identifies the development goals and objectives for the zone.

TABLE III-4
GOALS AND OBJECTIVES FOR TOURISM DEVELOPMENT

GOALS	OBJECTIVES
A. To expand the zone's competitive advantages with other areas, while maintaining and enhancing its unique 'accessible wilderness' image.	<p>A-1) To develop so as to capitalize on and around unique features (natural, historical, cultural, industrial).</p> <p>A-2) To develop so as to 'fill gaps' and to respond to existing problems so that a complete range of high quality services are available.</p> <p>A-3) To have new development complement existing development.</p> <p>A-4) To develop so as to integrate historical, cultural and natural themes throughout developments and communities.</p>
B. To increase the average length of stay in the zone.	<p>B-1) To develop additional recreation opportunities associated with the major activities of destination travellers.</p> <p>B-2) To develop an ongoing communication system to stimulate travellers to take advantage of other opportunities in the zone, especially those associated with the major activities.</p> <p>B-3) To develop the additional attractions (Chapter IV) which appeal to a broad range of interests and to develop tourism packages, present and new, so as to provide longer vacation stays.</p> <p>B-4) To locate attraction/services convenient to highway traffic, (without creating ugly strip development) and to communicate to the highway traveller the special character of the zone and its attractions and services.</p>
C. To increase the number of visitors to the zone.	<p>C-1) To develop more and/or better opportunities than available at similar costs elsewhere.</p> <p>C-2) To increase market awareness of the opportunities in the zone.</p> <p>C-3) To elevate the quality of service so that repeat visits will occur.</p> <p>C-4) To have more convenient, inexpensive transportation from population centres to the zone.</p>

TABLE III-4
(CONTINUED)

GOALS	OBJECTIVES
D. To increase year-round usage.	<p>D-1) To develop facilities and services that can be used during the winter and 'shoulder' seasons (either not sensitive to weather or take advantage of season).</p> <p>D-2) To develop a variety of packages which can be sold year-round or during a specific season.</p> <p>D-3) To provide safe, reliable transportation to and within the zone to ensure easy access to the zone in all seasons.</p>
E. To concentrate development in service centres and defined activities nodes.	<p>E-1) To enhance Sault Ste. Marie's position as the major service centre and zonal focal point.</p> <p>E-2) To concentrate development (occurring outside of Sault Ste. Marie) in the zone's other service/activity nodes.</p>
F. To increase per capita traveller expenditures	<p>F-1) To increase revenues of local private enterprises.</p> <p>F-2) To stimulate local economics</p> <p>F-3) To create opportunities for local employment in the tourism sector.</p>

CHAPTER IV

DEVELOPMENT STRATEGY: PRINCIPLES AND GUIDELINES

In the last chapter, the goals and objectives for the zone's tourism development were formulated. These goals and objectives were determined by analyzing the zone's problems and assets, the opinions of appropriate parties, trends, and the likely futures.

This chapter focusses on providing the basis for a strategy leading to the fulfillment of these goals and objectives. It gives eight basic 'development principles' which, in the consultants' opinion, are necessary to adopt. Each of the development principles is a strategy in itself and entails other strategy implications. These are detailed.

As well, this chapter provides guidelines for operations and activities. These guidelines are consistent with the necessary development principles developed earlier. The guidelines, to a large extent, provide directions to improve the present tourism plant and to fill gaps in the plant.

In developing a strategy basis it is, of course, requisite to look at the possible developments which can, or should, occur. Such possible developments should be considered as to where they could be located in the zone, what costs are involved, and as potentials to attract sufficient numbers of tourists. This is done in the next chapter.

As mentioned above, the first step undertaken, now that the goals and objectives have been defined, is to outline the necessary development principles (strategy guidelines) in the consultants' opinion.

There are eight principles, the first of which deals with the development of a 'positioning statement' for the zone. This positioning statement provides, in the consultants' opinion, what the image of the zone should be to best serve the goals and objectives, in consideration of the realities of the zone, and the desire to give the zone a distinctive image, attractive to increasing numbers of travellers, to sustain the further development of the tourism industry.

The positioning statement is then the step to 'position' the Sault Ste. Marie-Wawa zone as distinctive from other tourism areas. It is the step needed to define the zone's position in the overall tourism marketplace. Clearly, the other development principles must not only serve to meet the objectives and goals, but they must do so in the context of serving the image of the zone.

The eight basic development principles are discussed in the next section under the following topic headings:

1. Getting an Image
2. Get Cooperation
3. Do Appropriate Theming
4. Package Attractions and Services
5. Diversify Existing Attractions and Facilities
6. Cluster Attractions and Services
7. Reduce Negative Impact
8. Create New Development

Following this is a review of guidelines by industry sectors.

A. Development Principles

1. Getting an Image

The critical part of evolving a tourism development strategy rests on the development of a positioning statement and thus an 'image' for the zone--an image that is recognized by visitors, potential visitors and residents and that sets the zone apart from other areas. The adopted image, in turn, directs the approach taken in tourism development, e.g., the scale and types of opportunities offered. The zone must have an identity which distinguishes it from other sections of the province; the identity is fostered by both development and publicity efforts. It must be recognized that the identity and the attractions in the zone are very sensitive to intervening opportunities, and opportunities in other areas throughout the world. It is necessary, therefore, to have an image which helps the zone compete against all other tourism areas.

The appeal of the zone revolves around its beautiful and diverse natural features. This appeal must be expanded to include the impression or the actuality that there are several interesting and unique activities to participate in in that beautiful environment--activities that rest upon the existence of both the virgin wilderness and those settlement areas key to the historical, industrial and cultural development involved and pertaining to that wilderness.

Attractive to the zone is its balance of non highway-accessible space (wilderness) and settlement areas, with visible evidence of the historical links with that wilderness. The zone's visitors can not only enjoy the wilderness, but also have urban experiences and comforts. The variety of interesting wilderness-associated activity opportunities and the resource base settlement gives the zone major present and future potential appeal. The zone is close enough to major population to travel in one day, yet far enough away from those centres to be legitimately recognized as 'wilderness'.

Tourism development should build on the strengths of an area and be in keeping with the desires of the appropriate parties, including the residents.

For those reasons, the image of 'accessible wilderness' is the most appropriate for Sault Ste. Marie-Wawa.

Taking this image, the zone's position in the marketplace is to become the most outstanding wilderness area east of the Rockies--the area closest to major population centres that can offer a desirable range of landscape, water bodies and urban/non-urban areas. Several alternative images were considered prior to adopting the 'accessible wilderness' one. Massive investment can obviously create a whole range of images (e.g. Disney World) for any area. However, the economic realities, the zone's real problems and assets, as well as the various attractions and images of other areas in the province led necessarily and logically to the adoption of the 'accessible wilderness' image for the zone. This is the 'position' for the most competitive advantage over all other areas.

Any use of the term 'wilderness' throws the zone into competition with the rest of northern Ontario and, in fact, the entire northern portion of the continent. Consequently, the development and promotion of the area must be done with a great deal of sensitivity and coordination with operators.

The adoption of the 'accessible wilderness' image dictates the approach to be taken in tourism development. The wilderness image suggests uncrowding and seclusion. From a tourism development perspective, the desire is to develop, taking the approach of increasing the number of visitors while maintaining the uncrowded image. This does not preclude large-scale attractions (high capital costs and large appeal), but does indicate that care must be taken in developing large-scale attractions.

The image also implies that attractions to generate large volumes of traffic should be concentrated, in other words, located in existing developed areas.

The type of development should be consistent with the 'accessible wilderness' image or be of the type that services urban populations.

Touring opportunities, those involved with travelling by various modes of transportation, to view the scenic beauty must naturally be increased as a necessary consequence to the image and the improvement of the zone. There must be more opportunities to live in the wilderness and enjoy it, to participate in activities.

The urban centres must also offer more activities so that visitors can enjoy themselves without actually going into the wilderness. Indeed, many visitors will continue to stay in urban centres only to take day excursions into the wilderness. All the amenities normally provided in such centres need to be available.

The obvious attraction of the zone is really a staged series of smaller attractions rather than one large one, and using the combination of activities available in the area as a major draw for tourism is the logical one.

The presence of several different types of opportunities will serve to increase the volume of destination visitors--those visitors viewing the Sault Ste. Marie-Wawa zone as their ultimate destination rather than as a stop on their way elsewhere.

How opportunities are developed is as important as the type of activities. Implementation of themes for physical development and redevelopment by operators and municipalities and groups of operators will aid the visitor in recognizing that he is in a special place. The rich historical, cultural and natural heritage of the zone provides a choice of several themes for incorporation. These themes are discussed later on. There should be a major centre to provide a focus for tourism in which services are concentrated, from which visitors are dispersed into the surrounding countryside. This centre must service an increasingly urban population, used to urban conveniences, yet often seeking ex-urban opportunities.

Advertising, using the 'Accessible Wilderness' theme, should indicate that a variety of services and amenities are available, and that it is not necessary to bring all required supplies into the zone.

The accessible wilderness image is really the necessary and logical position for the zone in the overall tourism marketplace. The other development principles that follow serve to enhance this image and describe it more particularly.

2. Get Cooperation

The dispersed nature of the tourism industry in the Sault Ste. Marie-Wawa zone, combined with the fierce competition for tourists throughout the world, makes pulling in one common direction essential. A common direction which must work:

- a) to achieve the development goals and objectives for the zone;
- b) to help create the image the 'accessible wilderness'.

Co-operation not only provides benefits for the overall area, but the success of individual tourist establishments may rest upon the ability of operators to work together. As no one operation can totally service the traveller, operators must co-operate to ensure the traveller's total experience is of a high quality. All operators in the industry must recognize this interdependency, because one minor unpleasant incident can ruin an otherwise enjoyable experience.

The vast majority of the operations in the zone are small scale and single purpose establishments. Not one operation in the zone is large enough to create a zone identity or influence the total tourism outcome in the zone. The success of creating the image of a unique and special 'accessible wilderness' rests upon the combined efforts of all of the constituent operators.

Co-operation to achieve both the development goals and the creation of the image entail:

- a) Adopting the same theme to be used in physical development/redevelopment. This does not require structures to be exactly identical (there is some flexibility in interpretation of themes), but it does indicate to the user that there is an interesting thread of common identity within the area;
- b) Working together to assemble and promote 'packages' for visitors;
- c) Sharing mailing lists and recommending other attractions and services in the area (so visitors will stay longer).

3. Do Appropriate Theming

Theming is what sets the tone for the traveller as to the experience which can be expected. Physical theming of structures and communities is the first step required to help create the 'accessible wilderness' image. It is also the initial factor which creates interest in the traveller to use an establishment.

Making the zone a unique and special area requires that the theming of all facilities/structures complement and reinforce the overall image of the zone.

The 'accessible wilderness' image implies a rustic appearance, with extensive use of natural materials, such as wood and stone. In addition to construction materials, physical theming can be expressed in architectural design, (e.g., roof lines, elevated sidewalks, height of structure), physical layout (e.g., off-street parking, building set-backs, use of courtyards, types and location of lighting) and signs.

The communities within the zone played an important/integral role in the historical development of this 'accessible wilderness' zone. Communities must express their history in the form of physical theming. For example, the mining and fur trading history of Wawa can be expressed by physical theming of structures in the community. Illustrations of the application of themes are contained in Figure IV-1.

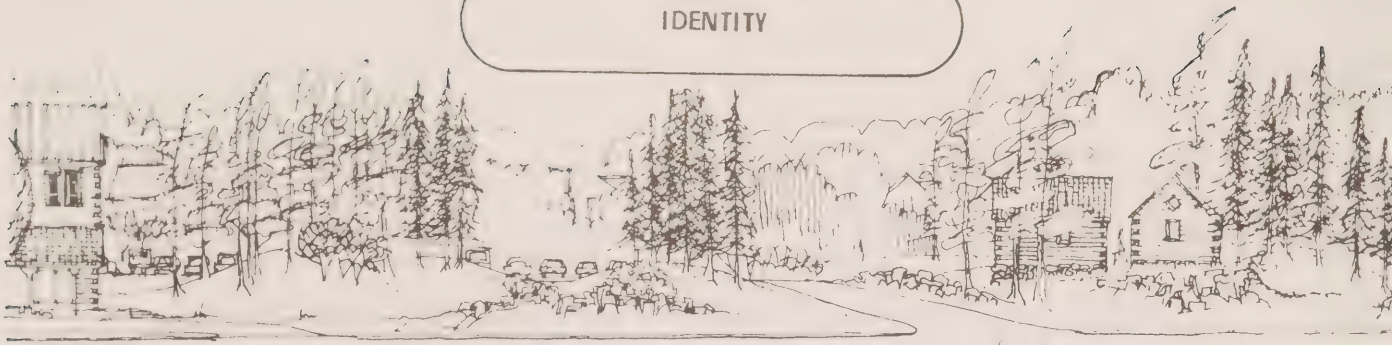
The development themes of the communities must be adopted and implemented by both private operators and the local government. Physical theming consistent with the development theme should be required of all new publicly funded structures and should be promoted for voluntary application by private enterprise. An information-piece and graphic demonstration should be developed by the appropriate planning authorities. Such action would illustrate applications of the theme in addition to building support for its adoption.

As buildings are remodeled, the development theme should be used. The success of the theming program rests upon the successful application in a variety of structures. It must be recognized that the theming program will last over decades and that the most difficult period will be right at the initiation period.

From a tourism perspective, there are key strategic locations within a community where theming must occur. These are, at entrance ways, on main business streets and at information centres.

Additional theming guidelines for the various sectors in the industry are discussed in section B of this chapter. Development themes by areas within the zone are also presented in the last section of this chapter.

FIGURE IV-1
IDENTITY



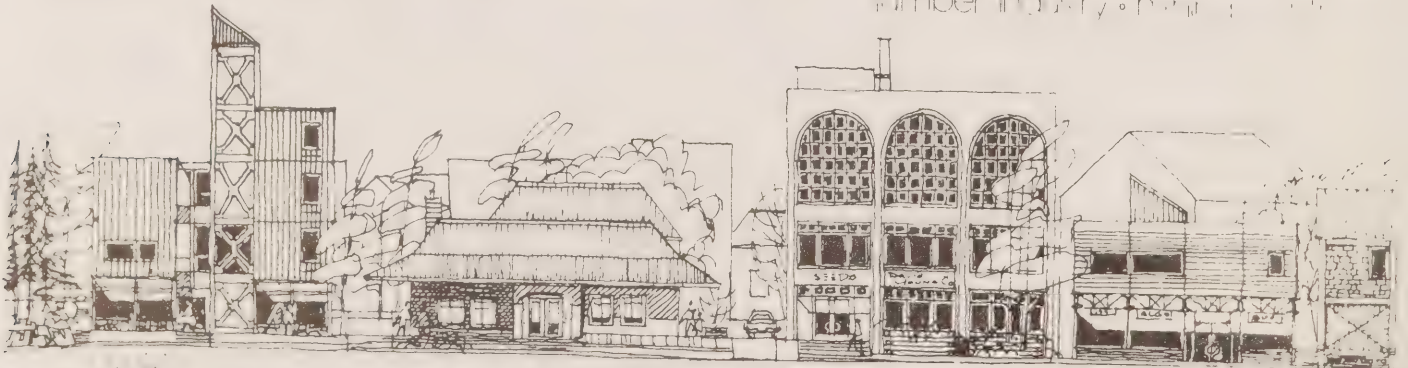
lumber • trading • equipment



lumber • trading • equipment



lumber industry • equipment



lumber • trading • equipment



4. Package Attractions and Services

The Sault Ste. Marie-Wawa zone is characterized by pass through and short duration trip visitation. The long duration destination market is small. To increase the number of destination travellers to the zone, there are two options. One, a major tourism attraction could be developed to appeal to the mass market. The other option is to combine several smaller attractions to create a larger appeal thereby making the area a destination spot. On selecting the 'accessible wilderness' image, the process of 'packaging' plays an important role in the further development of tourism in the zone. It is undesirable to have a mass market appeal which creates a crowded and more urban environment, but it is desirable to increase the number of visitors. 'Packaging', by its nature, can disperse the tourism traffic to specialized interest areas throughout the zone, while maintaining the 'wilderness' image.

The benefits of 'packaging' are twofold. First, packaging offers advantages to the tourism operator. Second, packaging provides an excellent method to respond to current and future market trends. For the operator packaging can be a means of expanding the operating season, increasing length of stay, and also can increase sales to new and existing markets. In some cases 'packaging' can reduce the direct costs to the traveller and, in turn, likely increase sales. Initially the costs of developing and selling the package are high but, on becoming established, the package tends to carry on its own with minimal promotional costs. If the package satisfies the customer, there is greater chance of repeat visitation and getting referral business from the pleased customer.

Increasingly the travelling public is taking more prepackaged vacations. This is particularly true with the 65 and over age group. Larger percentage of the population in this age group and the retirement age lowering, predict greater demand for 'packaged pleasure trips'. The population wants the convenience of the totally planned travel experience. Greater importance is being placed on individualism, resulting in the demand for travel 'packages' which meet personal interests and life styles. The increasing costs of travel have also had an impact on the demand for 'packages'. Travellers are demanding value for their dollars. Through packages, they are relatively confident of what they are buying as they are usually recommended by a reliable source,

whether it be a travel agent or personal friend.

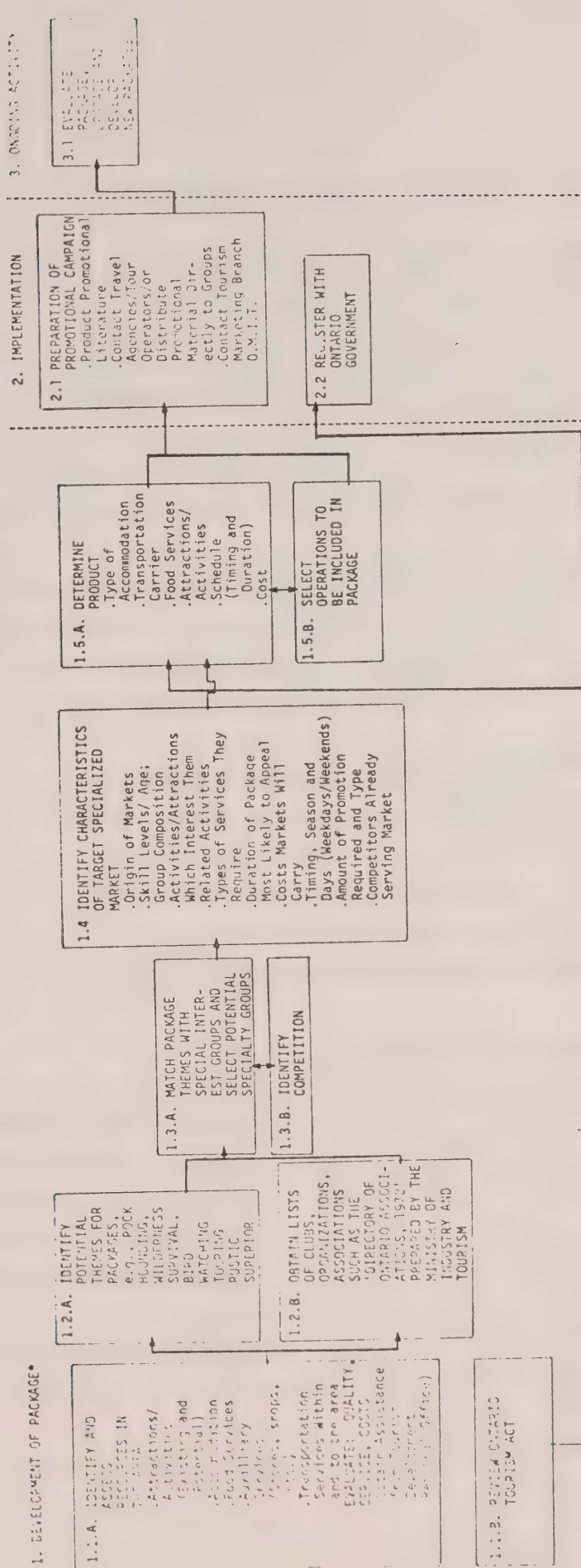
There are two factors determining decisions to buy packages. Either a package reduces the direct cost, or it caters to individual personal interests, or it does both. Packages would compete poorly on costs. The costs of accommodation, transportation and other services are currently too high to compete. The Sault Ste. Marie-Wawa zone thus must cater to specialized interest groups. Packages that are developed must be unique and exciting.

Unlike the packages selling 'sun and sand', which include transportation and accommodation to a single destination only, packages for this zone should be developed more along the lines of most European packages which have a touring orientation. Thus, the packages should offer scheduled day trips from a central accommodation facility or provide a variety of accommodation related to each activity day (e.g., first night in Sault Ste. Marie, the following day on the A.C.R. Tour Train, second night spent at a resort on the A.C.R. line, etc.). It is important that the package is activity-oriented. Whether or not it is passive (i.e., viewing), or active (i.e., participation) oriented, it is the mix of the activities which makes a successful package.

As mentioned, people like the convenience of packages. However, as members of a group they often feel their individualism is jeopardized. A successful package includes a personal touch. Too often, packages just offer supervision. More interpretation of the attractions and other resources (human/natural/man-made) should be done. Ideally, visitors on packaged trips should leave the zone with an understanding of the cultures and life styles found in the area. Personal encounters with residents of the area will be remembered long after the trip itself. They should be familiar with other attractions they did not see and have an impression that they only saw a small portion of the many attractive features and resources.

Co-operation among operators is the key in the development of packages. Each operator has a responsibility to provide consistently good service, as well as ensuring other operators the same. The development process, and especially the implementation of the package, can be expensive. It is important that all operators involved collectively do up-front research to ensure the final product will sell. Figure IV-2 outlines the steps involved to develop a package. There are no shortcuts. Every step must be undertaken.

FIGURE IV-2
HOW TO PUT A PACKAGE TOGETHER



In addition to the schematic, there are several questions which need to be addressed:

- .Will the 'total experience' be of high quality (accommodation, food service, transportation, attractions, etc.)?
- .Is the mix right (scheduled time versus free time; type of attractions versus other types of attractions included; accommodation used related to theme of package, etc.)?
- .If the target market is the 'family', what activities will be provided separately for the adults and children, and will babysitting services be required?
- .If the target market is characterized as being low spenders, what flexibility do you have in selecting types of accommodation and other services (e.g., will the market give up luxuries/frills in order for the package to be within their financial means)? This does not mean giving up quality.
- .Are their discretionary budgets limited? Can they budget better for long weekend trips opposed to one or two week trips?
- .Can the specialized market get a similar experience elsewhere which is cheaper, closer, or has a better tourism plant to work with?

These and many more questions directly related to the selected market will have to be identified and answered before selling a package.

5. Diversify Existing Attractions and Facilities

It has been widely acknowledged that plant development based on a single tourism activity is likely to encounter problems associated with seasonality, changing consumer preferences, and a narrowly-defined market. Furthermore, from the consumer's perspective, a development that offers a diverse range of complementary tourism and recreational opportunities will encourage longer visits and more repeat visitation.

Diversification aids in three ways. It can be a means of appealing to broader markets. It can lengthen the stay of the visitors or diversification can expand the operating season.

To increase market appeal and extend length of stay, the following approaches could be taken:

- a) Operators of establishments largely dependent on the business travel market should diversify. Little can be done to expand the business or 'task oriented' market. To ensure good year round usage, the market appeal must be broadened. More services for the discretionary or leisure traveller need to be provided. Diversification would also permit these operators to capitalize on the resident market for 'evening out', rental of meeting facilities and generation of VFR (visit friends and relatives) traffic.
- b) When an operator is largely dependent on the discretionary traveller, additional activities/opportunities should be provided. These additional activities should complement the existing activities at the establishment (e.g., camping and trail biking or snowmobiling and crosscountry skiing are activities which should not occur together) and focus on rounding out the range of activities to be offered.

A review of the related activities in Table IV-1 would provide guidance as to the possible combinations of activities for development.

The provision of additional opportunities in both approaches would increase the length of stay of the visitors.

Tourism in the Sault Ste. Marie-Wawa zone exhibits a summer focus. The short operating season of many establishments result in low investment returns and off-season unemployment. Diversification to expand the operating season could involve:

- a) Developing 'single season' activities together in sequence (e.g., boating in summer, hunting in fall, skiing in winter) so that a year-round operation can be maintained.
- b) Extending the season by additional development (e.g., artificial snow on ski hills, enclosing swimming pools) and also encouraging use of these facilities during the 'shoulder' seasons.
- c) Developing a mix of activities (e.g., combining accommodation with food and beverage services, and entertainment) of which some have great appeal to the local resident user group. The revenue generated from the local residents in the 'off season' would permit year-round operation.

TABLE IV-1

● HIGH FREQUENCY OF ASSOCIATION

▲ HIGH FREQUENCY - BUT MORE DEPENDENT ON AVAILABILITY OF OPPORTUNITY RATHER THAN NATURE OF PRIMARY ACTIVITY

PRIMARY ACTIVITIES	BOATING					FISHING				HUNTING			SKIING		OTHER OUTDOOR RECREATION										VIEWING ATTRAC.		VISIT MAN-MADE ATTRACTIONS						SECOND RESIDENCE			RESORT VACATION			CAMPING								
	Large Sailing Craft	Cruisers	Houseboats	Canoes/Tripping	Outboard Touring	Casual	Auto Access	Wilderness	Ice	Casual	Big Game	Wild Fowl	Small Game	Downhill	Cross-Country	Swimming Major Beaches	Hiking	Water-Skiing	Scuba Diving	Snowmobiling	Tennis	Horseback Riding	Golfing	General	Niagara Falls	Shopping	Eating Out	Special Events	Industrial	Educational	Amusement	Historical	Lakeshore	Upland	Special Purpose	Resort Hotel	Wilderness	Special Purpose	Destination	Wilderness	Touring	Urban Experience	Tour Groups	Touring Individual			
Shopping																																															
Eating Out																																															
Special Events																																															
Industrial Attractions																																															
Educational Attractions																																															
Amusement Attractions																																															
Historical Attractions																																															
Business Route Task																																															
Business Single Task																																															
Business Event-Conven.																																															
Second Res.-Lakeshore																																															
Second Res.-Upland																																															
Second Res.-Special Pur																																															
Visit Friends/Relatives																																															
Resort Vac.-Hotel																																															
Resort Vac.-Wilderness																																															
Resort Vac.-Special Pur																																															
Camping-Destination																																															
Camping-Wilderness																																															
Camping-Touring																																															
Urban Experience																																															
Tour Groups																																															
Auto Touring																																															

Source: Ontario Recreation Survey, 1973-74.

Copied from -- Tourism Development in Ontario: A Framework For Opportunity

A review of length of season by activity type in Table IV-2* would provide guidance as to possible combinations of activity which would extend the operating season.

It should be recognized that the selected 'accessible wilderness' image will dictate to a certain degree the type of tourism activities which can be developed in the zone.

6. Cluster Attractions and Services

Clustering of attractions/events, activities and support services and facilities is more efficient than dispersed development. Through clustering, the appeal of an individual operation can be broadened as additional attractions and services are available nearby. Developing in areas having the basic infrastructure can also reduce the costs. Those tourism support services that do not generate travel (e.g., gas stations, fast food restaurants) can benefit from both the resident population and visitors.

Support of the clustering development principle also aids in creating and maintaining the zone's 'accessible wilderness' image. This development principle does not permit dispersed or strip development which, if permitted, could destroy the appeal of the areas within the zone, which afford an untouched natural environment experience.

Attractions and support services and facilities should occur only in areas of high commercial activity, in areas having high recreational activity or at strategic service points along the major highways.

7. Reduce Negative Impact

The selection of the 'accessible wilderness' image will undoubtedly generate more interest in the resource base. Aroused interest in the resource base often leads to more intensive utilization. Types and location of usage and tourism developments must be managed and controlled. 'Unique' environments must be protected and preserved. The zone should have designated areas/land

*Table IV-2 describes participation in tourism-related activities by season from a province-wide perspective. Since Ontario is a very large province, one must recognize that the climatic components affecting participation vary considerably in response to latitudinal and altitudinal variation across the province, and to the influence of the Great Lakes.

LENGTH OF SEASON BY ACTIVITY

ACTIVITY	APRIL	MAY	JUNE	JULY	AUGUST	SEPT.	OCTOBER	NOV.	DEC.	JAN.	FEB.	MARCH	COMMENTS
BOATING													
General	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	- varies with species and area.
Sailing (larger craft)	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	- tends to be largely males in spring and fall and families in summer.
Canoeing	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	
FISHING													
Casual	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	(Varies greatly for species, geographical location and resident/non-resident).
Family Peak Season	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	- summer hunting - residents only and non-protected animals.
Ice Fishing	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	- Deer - after Nov. 15
HUNTING													- residents only.
General	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	- varies within the province with climatic conditions.
Moose	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	
Deer	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	
Bear	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	
Wild Fowl	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	
SKIING													
Downhill	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	- varies with length of seasons within province.
Cross-Country	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	- swimming varies with geographical area & water body, e.g., Lake Superior never comfortable for swimming.
OUTDOOR RECREATION													
Summer Activities	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	
Winter Activities	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	
Swimming	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	
Snowmobiling	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	

----- high Participation

----- low Participation

continued . . .

TABLE IV-2 (continued)

ACTIVITY	APRIL	MAY	JUNE	JULY	AUGUST	SEPT.	OCTOBER	NOV.	DEC.	JAN.	FEB.	MARCH	COMMENTS
VIEW NATURAL ATTRACTIONS													
SHOPPING													
EATING OUT													
ATTENDING SPECIAL EVENTS													
VISIT MAN-MADE ATTRACTIONS													- may be some decline during winter months
EN ROUTE ELSEWHERE													
Urgent													
Non-Urgent													
BUSINESS - TASK													
BUSINESS - EVENT													- varies greatly with individual attrac- tion
SECOND RESIDENCE													
VISIT FRIENDS AND RELATIVES													- depends on accessi- bility, distance to permanent residence and winterization of facilities
ACTIVE/PASSIVE													
RESORT VACATION													- some decrease in winter months, part- icularly on part of other Canadians
Urban													- summer focus
Wilderness													- season can be ex- tended to year round if plant exists
													- speciality depends upon activity

continued . . .

TABLE IV-2 (continued)

ACTIVITY	APRIL	MAY	JUNE	JULY	AUGUST	SEPT.	OCTOBER	NOV.	DEC.	JAN.	FEB.	MARCH	COMMENTS
CAMPING													
Urban, Touring and Wilderness													- small amount of winter camping
URBAN EXPERIENCE													- some decline during winter
TOURING Group and Individual													

use guidelines. Man-made attractions and support facilities should be clustered in existing service centres and at designated service nodes en route. Intensive site development (e.g., amusement attractions) should occur in service centres or selected activity nodes. Space demanding tourism developments particularly non-urban tourism developments (e.g., cottages, campgrounds) should occur in designated areas. Only extensive recreational activities should be encouraged and provided for in the undeveloped areas within the zone.

Of course, careful planning must occur at the site level to avoid undesirable impacts. The scale of development must be suitable to the capability of the resource base. Local planning authorities must be contacted prior to the construction stage in order to identify sensitive areas and development constraints.

8. Create New Development

Within the zone there are few attractions which have a significant impact on the overall tourism industry. The several small attractions on their own have minimal appeal. New attractions are necessary to round out the range of activities and respond to deficiencies in the current plant. New development must focus on helping to create a unique and special area.

The adoption of the 'accessible wilderness' image has direct implications as to the type of development which should occur and where the various developments should be located. All new development must compliment and enhance the 'accessible wilderness' image. As mentioned earlier, new intensive use developments should occur in the service centres as activity nodes. Developments in the undeveloped areas in the zone should facilitate extensive recreational use. To broaden the market appeal, these extensive recreational opportunities should cater to two types of markets. Guided and supervised touring opportunities into the wilderness areas will appeal to those who prefer to only view the wilderness.

The zone provides potential for touring by land, water and air and a variety of modes of transportation could be used. Opportunities for individuals who want to participate in the wilderness should also be provided (e.g., canoeing, hiking, crosscountry skiing).

New developments should maximize the zone's assets. The history of the zone should be interpreted to the visitors through new development. The rich cultural and ethnic mix warrants attention for development. The zone contains hills, having the potential to provide the longest and best ski runs in the province, which might be considered for development. The several small scale attractions within the zone should be upgraded and packaged with other complementary attractions to produce a larger appeal.

An objective is to make the city of Sault Ste. Marie the focal point in the zone. This implies that tourism facilities and services should be clustered in a central location within the city. New tourism development is required in the city to create this focal point for tourists (refer to section C-2 for possible development opportunities).

All new development must follow every development principle:

- 1) Get Cooperation.
- 2) Do Appropriate Theming.
- 3) Package Attractions.
- 4) Diversify Existing Attractions and Facilities.
- 5) Cluster Attractions and Services, and
- 6) Reduce Negative Impacts.

and also help create the 'accessible wilderness' image.

A shopping list of possible development opportunities is found in Chapter V.

B. Development Guidelines by Sectors

Guidelines for developing/upgrading and operating specific sectors of the tourist plant are outlined in the following section. Guidelines are presented for:

- | | |
|------------------------------|---------------------------|
| Attractions | - Natural |
| | - Industrial |
| | - Historical |
| | - Educational |
| | - Amusement |
| Accommodation Establishments | - Motels/Hotels |
| | - Resorts/Rental Cottages |
| | - Outpost Camps/Cabins |
| | - Campgrounds |
| Food Services | |
| Retail Stores and Shops | |
| Information Services | |

Few municipalities have been involved in planning for tourism. Recognizing the emergent need of such planning, guidelines for municipalities are also included.

1. Guidelines for Attractions

Attractions are the essential component of the tourism plant--they provide motivation for people to travel. Without these attractions, tourism as we now know it simply does not exist. Even free attractions have economic impact in an area, as they result in increased spending in the area.

The zone's attractions should serve to interpret the area to the visitor. They should act as introductory points to other attractions so as to increase visitor length of stay. Development of new attractions should be clustered with other attractions so that there is something of interest for all ages. Activity/attractions areas should be staged in the zone encouraging touring and in addition to providing for the destination travellers. It is preferable to develop attractions close to other services (i.e., accommodation, food services, etc.). New attractions and existing attractions should

address the possibility of providing year-round appeal. The most successful operations are those which have repeat visitation appeal. This is accomplished by having high quality activity-oriented attractions. For display-oriented attractions, changes in/rotation of displays help accomplish repeat visitation. Historically, visitors to the zone have been predominantly male, with some family touring market. Attention must be given to providing 'family' attractions.

The decision to visit an attraction often depends on the time available. Most travellers are interested in an attraction which will consume about 1-2 hours of their time. Attractions should be developed in a way that the visitor can spend 1 hour there, or all day if desired. Planning attractions in this way is necessary to capture the large market of the pass through traveller.

There are many kinds of attractions, a number of which have several different types of appeal. Although the guidelines for each type of attraction will be outlined individually, it must be remembered that several types could be combined for mutual benefit to the attraction site.

Natural attractions--In the Sault Ste. Marie-Wawa zone, the natural attractions have been the major attractive features. Under the 'accessible wilderness' image selected for the zone, their importance is reinforced. Currently, the natural attractions are experienced by the touring auto traveller in a 'fly by night' way. Few natural attractions are adequately signed, nor are parking or picnicking facilities provided.

The Algoma Central Railway has capitalized on the natural features in the Agawa Canyon, a major attraction in the area. Improvements can be made to this experience, but there are numerous other opportunities in the zone for similar developments which enable the traveller to experience the wilderness in a controlled and guided fashion.

The natural features in the zone must be preserved and protected. However, development to make the natural features more visible and appealing to visitors must also be undertaken. The design of facilities/structures (i.e., parking lots, shelters, possibly gift and food service facilities) should complement natural features. Midway-type commercial development should be located away from natural features.

Other specific guidelines to preserve and enhance natural features are:

- i) parking areas should be located away from the feature,
by trees or berms or other natural buffers;
- ii) signs directing traffic to the natural feature should
be themed;

- iii) interpretation of the natural feature should be provided through signs/external display areas;
- iv) viewing areas should be designed and selected to not interrupt or destroy the natural attraction;
- v) where trail networks can be developed, they should be carefully located and maintained.

Natural features as attractions are of two types in the Sault Ste. Marie-Wawa zone, either:

- a) the site-specific natural features such as

- Gros Cap
- Cobble Stone Beach on Lake Superior
- Chippewa Falls
- Scenic Lookouts onto Lake Superior
- Leeburn Ripple Rock at Desbarats

and many other geological and land formations, historical and archeological and vegetative features; or

- b) the collective mix of natural features such as the interior of the zone, the untouched natural wilderness offering opportunities for scenic touring.

Many of the specific features warrant development. However, to maintain the interior scenic attractions, canoeing, hiking and possibly auto trails should be designated and the skill required to travel the trails should be made known to the public.

Industrial Attractions--Industrial attractions are of increasing interest to the travelling public. The family market, in particular, are interested in these types of attractions as a learning and sharing opportunity for the entire family is offered. Industrial attractions have the advantage of being able to key in on specialized target markets (e.g., retired steel workers may be interested in Algoma Steel's operations).

Historically, industrial attractions operated as tours. Several industrial tours have been discontinued or altered because of insurance problems and interruptions with the ongoing operations. The tours also have tended to have limited appeal because they often last too long for many travellers. Tours lasting 1-2 hours are the most desirable. The development of activity-oriented display areas is a good alternative to tours. A display area could be set apart from actual operations, thus reducing insurance problems, and also providing flexibility time for the traveller.

Whether a tour or a display area, the industrial attraction should portray to the visitor a feeling of the area. Interpretation of why the industry is in the zone, its influence on the development of the community, the historical development of the industry, as well as a description of the process on how the industry is operated should be provided. Selling the products manufactured, or souvenirs, should be considered. Travellers are often interested in such items. Also, the company would cover some, or perhaps all, of the costs for the operation of the attraction.

The zone's many large industries are obvious selections for providing tourism attractions. Visitors crossing the International Bridge cannot help but notice that Sault Ste. Marie has substantial industry. From a tourism perspective, this entrance to Sault Ste. Marie is aesthetically undesirable. However, if the industries were to be tourism attractions in themselves, this 'eyesore' may be more readily accepted by the traveller.

Many of the larger industries are involved in tourism, such as the Algoma Central Railway, Algoma Steel Corp. Ltd. and Weyerhaeuser (Ontario) Limited. There are other industries in the zone which could also be of interest to visitors. Soo Mills is known for its Michigan Maple butcher blocks. The Hydro operations at Wharnccliffe and Montreal River Harbour also could be promoted to the visitor. Other potential industrial attractions are the Forest Insect Laboratory in Sault Ste. Marie, The Helen Mine in Wawa, Fisheries Branch of Environment Canada located by the locks, Commercial Fishing at Mamainse, and Birchland Vanier Ltd. in Thessalon. The old copper mine in Bruce Mines could be of industrial as well as historical interest.

To add to the success of industrial attractions, cooperation between the industries and other tourism operators is necessary. Accommodation operators should encourage guests to visit the industrial attractions. As most of the industries are based on resource extraction in the area, the visitors at the industrial attraction should be encouraged to venture out into the zone to view other aspects of these operations (i.e., Wildwood operation in Searchmont, Helen Mine in Wawa).

Historical Attractions--The high capital costs and limited financial return make public financing necessary for developing most historical attractions. Historical attractions are, however, viewed by both Provincial and Federal Governments as desirable public services. Private sector involvement has been very limited unless auxiliary commercial opportunities (i.e., restaurants, gift shops, accommodation, etc.) are located on site. In this

situation, the commercial assets are realized through the auxiliary services.

The private sector must be sensitive to the need to redevelop historical sites/structures exactly in line with the original development. Commercial ventures should be compatible, and the theme should be consistent with that of the attraction. In most cases auxiliary structures should be of the actual site, both visually and physically.

Many of the zone's historical attractions are only partially developed and partially themed. They also tend to be small and dispersed. For the zone to become competitive as an historical attraction destination area, more clustering, expanding and upgrading of the attractions is required.

Traditionally, historical attractions tend to be merely viewing-oriented with subsequent repeat visitation appeal. The visitor should have the opportunity to become involved in the attraction (e.g., possibly Fort St. Joseph could offer canoe rides around the point where the fort is located). Activities are a means to encourage repeat business and to produce revenue. Gift shops, restaurants and compatibly themed amusement activities should be encouraged on site.

Many of the zone's historical attractions/sites have historical ties. The historical relationships lead naturally to opportunities for historical tours. Again, operators of historical attractions should also encourage visitors to visit other historical attractions in the zone. This cooperation among operators will assist in keeping visitors in the area longer and will provide the traveller with a more complete historical experience.

Historical attractions are confronted with high competition because of the numerous intervening opportunities found in Michigan. Ideally, Fort St. Joseph should be totally restored but, given the number of forts along Interstate Highway #75 in Michigan, one must question the practicality of doing so. Any new development of historical attractions must be unique - offering a totally different experience. Interpretation and an activity orientation are necessary for the success of a historical attraction. On-site personnel should be dressed in costumes and involved in activities of the time (i.e., the making of bread at the Old Stone House, the tanning of furs at Fort Michipicoten).

Stories of the past add to the travel experience. Senior members of the community with personal experience to relate or who had stories passed down to them from relatives are excellent to add meaning to the historical travel experience.

Educational Attractions--An attraction, which is considered educational, varies as to the traveller's perceptions. For example, an historical or industrial attraction may be considered an educational experience by some, but not by others. Defining educational attractions is therefore difficult.

Nonetheless, the zone's recognized current educational attractions are:

- Sault Ste. Marie Canadian Locks and Canal
- Tarentorous Fish Hatchery
- Civic Centre in Sault Ste. Marie
- Great Lakes Power Co. Powerhouse
- The Provincial Air Service

This list demonstrates the private sector has had little role in the provision of educational attractions. The private sector is interested in commercial investments, and so their role tends to be more in the development of auxiliary services (restaurants, accommodation, etc.) in the proximity of the attraction.

The guidelines for educational attractions vary for each attraction. However, all attractions of this kind should be concerned with interpreting the attraction to the public.

There are additional opportunities in the zone for educational attractions. Sault College could be made available to the travelling public. The hydro operations at Wharnccliffe and Montreal River Harbour could also be interpreted to the traveller.

Amusement Attractions--Currently, there are very few in the Sault Ste. Marie-Wawa zone. Amusement attractions are beneficial to a tourism area because they have high repeat visitation appeal and they appeal to the family market. These attractions should provide opportunities for all members of the family. Under the selected 'accessible wilderness' theme for the zone, it is very important that the design and type of amusement attraction be sensitive to the theme. Midway type of development would be undesirable.

The short operating season in the zone may present problems in trying to develop a large scale amusement attraction. Amusement attractions should have indoor sections to extend the operating season and to still be attractive during days of poor weather in the peak season.

Tourism operators should tie their operations into the overall image of the zone. The development of an unrelated amusement attraction is undesirable. However, tied in with a historical or natural theme and the image of the area, it could give the zone that additional appeal to expand the family

market and make the area more appealing as a destination area. Some examples of amusement attractions which would be consistent with the appeal of the zone are: a log flume ride to tie in with the forested wilderness; horseback riding or wagon rides for the early exploration which occurred in the zone.

Part of the appeal of an amusement attraction is the congestion/high volume of people. New development should occur in activity nodes within the zone. The best locations for development are near Sault Ste. Marie or Wawa where other services are available. These locations have the resident and cottaging population to provide a stable base market for the attraction.

2. Guidelines for the Agawa Canyon Train Tour

The Agawa Canyon Train Tour is extremely important to the tourism industry in the Sault Ste. Marie-Wawa zone and, in fact, to the whole province. For this reason, it is critical that the experience offered is superb. Although the tour is presently operated quite well, improvements could be made. These improvements relate to the activity base in the Canyon and to the return train trip.

The two hours allotted for touring the Canyon cannot be filled by the average visitor. Consideration should be given to providing more and varied activity opportunities. Presently, the passengers tend to be middle to older aged, and some families. To broaden the market, the Algoma Central Railway must respond by providing more to do in the Canyon. An interpretive area with exhibits and displays describing the history of the railway would be of interest. More extensive recreational opportunities, such as hiking trails north or south of the Canyon, should be provided. On high passenger volume days, the Canyon gets too crowded and congested. Since it should be an objective of the tour to provide a wilderness experience, passengers should be dispersed as much as is possible within the realms of safety and control. Doing such would prevent crowding.

Other possible activities are rowboat or canoe rides on the Agawa River. A river ride on rafts connected to underwater cables would add to the experience and, at the same time, control the distance travelled and time spent. Passengers could be encouraged to bring fishing rods or rent them to fish in a stocked trout pond. Shelters should be provided in the picnic area so that passengers need not return to the train in poor weather. A lodge facility with fireplace could possibly serve the dual function of housing displays and accommodating visitors in rainy weather.

A gift shop selling souvenirs related to the Algoma Central Railway and the Agawa Canyon experience could be operated in the Canyon. Crafts made by the zone's native Indian population could also be sold.

The commentary and the scenery hold the passengers' interest on the train ride to the Canyon. On the return trip, passengers often feel bored and tired. The 'bad' ending is often more remembered than the enjoyable part. Passengers on the train must be entertained. Playing cards or reading materials could be sold. If the vendor were dressed in an early conductor's costume or a trapper wearing a beaver skin hat and buckskin jacket, that would add to the experience. Earphones could be rented at a nominal fee to listen to humorous or dramatic taped radio plays (based on railway stories).

The Agawa Canyon Tour train has the advantage of having a captive audience. The return train trip is an opportune time to promote the Sault Ste. Marie-Wawa zone. Brochures and literature on the zone should be distributed to the passengers before leaving the train. Passengers should be encouraged to visit other attractions in the zone and to take the train for the other season's tour.

3. Guidelines for Accommodations

The typical accommodation operator in the Sault Ste. Marie-Wawa zone has worked under the assumption that it is his establishment that is bringing people to the area. This misconception has created many problems for the industry. Accommodation establishments must either provide activity opportunities on-site or be located near activity areas (i.e., near a main destination attraction or a cluster of small attractions.) Thus, those accommodation facilities not providing on-site opportunities are very dependent on external operations over which they have very little control.

Keeping rooms occupied is the main goal of an accommodation establishment. To achieve this goal, every establishment should develop a marketing strategy. This marketing strategy relates directly to design, renovation, expansion, period of operation, pricing and services. They all influence the establishment's image and its ability to attract and comfortably service guests.

The more you know about your guests, their attitudes, opinions, desires, the more effectively you can market your product. New operators should identify their target market and strategy before construction is contemplated.

The accommodation industry has three potential markets: the vacationer/pleasure trip traveller, the business market, and the personal market. Based on the target markets, accommodation facilities categorize into two types, 'destination' and 'transient'. 'Destination' accommodation facilities are resort motels, resort hotels (lodges) and outfitters. Guests stay longer and they must be entertained, fed and lodged. Natural surroundings and activity opportunities on-site are extremely important to 'destination' facilities. 'Transient' accommodation facilities usually are city hotels, motor inns and roadside cabins. These facilities are more dependent on visibility and accessibility. Often, each type of accommodation facility will service both destination and pass through travellers, but the facilities and services provided are determined by the selected target market.

All accommodation operators should have the following objectives:

- .to keep the destination traveller in the area as long as possible;
- .to encourage the destination traveller to return to the area;
- .to encourage the pass through traveller to return as a destination traveller.

The attitudes and approach of staff and guests should receive attention as well. Employees are salesmen. Their personality, manner, dress and business actions contribute to an establishment's reputation for hospitality. Standards for hospitality should be set. Training programs for all levels of personnel should be provided.

The personal contacts that are made are most often the best remembered part of the travel experience. Employees should be encouraged to interact with guests. Opportunities for guests to interact through facilities and by facility design should be provided.

Guests should be made aware of the establishment's facilities and services. Posters, place mats, matches, stationery, menus and/or leaflets can be used to do this. Good personal recommendations are the most effective and least costly form of promotion. Operators and their staff should reinforce and remind visitors of their stay by providing carry-away items with the establishment's name inscribed (i.e., matches, post cards, etc.).

The trend for all types of accommodation establishments to provide all the amenities (once typical of only luxury hotels) has contributed to the

relatively high prices of the accommodation industry in Ontario and the zone. Recently, the travelling public have demonstrated that economizing is a more important factor in selecting a vacation or using a facility. Many are willing to give up some of the amenities if the price factor is significant. New development should respond to increasing economizing-oriented markets or, alternatively, to the other growing market group which desires more luxury and prestige.

Physical guidelines for types of accommodation are included in the following discussion.

Motels/Hotels--The location of these types of establishments is very important. They should be developed either near a major highway or within a community. Easy and well signed access routes off the major highway are a must. Restaurants, car services and entertainment should be close by. Nearness to airports and other public transportation connecting points should also be considered when selecting a location.

Appearance is often a major factor in a traveller's choice of motel/hotel. The exterior design of the facility site makes the first impression on the traveller. That appearance can be a real sales tool. Accommodation facilities often have an exterior theme, but that theme is not incorporated into the interior. A distinctive image should be created and that image should be reflected throughout the establishment. The interior theme should match the exterior theme. The design theme employed should complement local selected development themes.*

The physical layout of a hotel/motel should be designed for the convenience of the guest. Parking should be available near the guest rooms. If recreation facilities are provided, parking and rooms should be located away from these facilities.

Road signs to motels/hotels must be clear and should be located far enough in advance to prepare the traveller for stopping. Signs should be themed so as to correspond with the theme of the facility. Signs or billboards should be placed around the community and on access routes. These signs should give simple and accurate directions to the establishment. They should effectively and honestly illustrate the establishment. Road signs and signs at the establishment should be similar in appearance so that there is a visual consistency.

* For theming guidelines see page 70.

Resorts and Rental Cottages--Both are generally located in a non-urban setting. Recreational opportunities are provided on-site and the length of stay of guests is generally longer than in other types of accommodation facilities. As the 'accessible wilderness' image has been selected for the Sault Ste. Marie-Wawa zone, both new accommodation establishments and existing operations planning major renovations should consider theming their establishments consistent with this image. 'Wilderness' implies uncrowded, natural beauty and a secluded setting. Resorts/rental cottages, no matter what size, should be designed to foster this image.* The exterior and interior design should be such that they mesh with the surrounding environment. Natural vegetation and habitat should be retained. Compatible structure design can be achieved through the use of natural building materials and large windows to blend with the environment. Prime consideration should be given to providing good views wherever possible. Figure IV-3 shows some design techniques which were developed using the above guidelines.

FIGURE IV-3
POSSIBLE STRUCTURAL DESIGNS FOR RESORTS/RENTAL COTTAGES
WITHIN THE SAULT STE. MARIE-WAWA ZONE



*The resort experience begins when the traveller leaves the main highway. Road entranceways should create an out-of-the-way feeling.

Obviously, making sure the guests have an enjoyable time is necessary for resorts and rental cottage operators. The layout of both lodging and recreational facilities should give guests the opportunity to see others enjoying themselves, which will encourage participation and facilitate social contact between guests.

Operators of resorts/rental cottages should recognize that their competition will be spread further afield than the motel owner's. In effect, their competition is all the other resorts inside Ontario and even resorts in America and overseas countries. It is critical that a target market be identified and that the activity opportunities provided respond to its needs. No longer can such operations survive on just fishing and hunting. The activity base must be diversified. Both indoor and outdoor activities should be considered. Consideration should be given to providing the following summer activity opportunities: boating (sailing, rowing, canoeing), swimming, hiking, climbing, tennis, golfing, horseback riding and field sports. Possible winter activities are skiing (both downhill and cross country), snowmobiling, ice fishing, skating, tobogganing, snowshoeing, ice sailing, for resorts considering becoming a year-round facility. To maintain shoulder season occupancy, the facility could cater to the bus tour markets visiting the area for the Fall Colour Train Tour. Special interest groups, such as bird watchers, rock hounds, and even educational institutions, could be encouraged to use the facility as their base and the facility would cater to one or more of the specific interest groups. The business travel market is showing increasing interest in small meetings/retreats at resorts and encouraging that business would work to increase shoulder season or even winter occupancy.

Existing operations must also consider diversifying and expanding their market appeal. This process can be expensive and it is difficult to justify the expenditures for small operations. Small operators might consider pooling their resources to collectively provide recreational facilities.

Outpost Camps/Cabins--These facilities can be simple, yet they must be clean and comfortable. The prime requisites are that the beds are comfortable and the equipment works.

These fly-in operations are generally serving the hunting and fishing market. Their seasons are spring and fall, with little activity during the summer months. Attempts have been made, with little success, to fill the summer months with the family market. Activities such as backpacking, photography, and painting could be promoted for the summer season. Alternatively,

if these operations were affiliated with a base resort, the entire family unit's vacation needs could be serviced. Interested members of the family could be flown into an outpost camp for a few days while the rest of the family enjoys the comforts of the resort.

Personal contact on arriving and leaving is important to the outpost camp experience. The traveller should be well informed of what can be expected. Operators should contact the visitors at the site on a regular basis to ensure the guests are safe.

The flight into and out of the outpost camp must be scheduled.

Campgrounds--There has been a great influx of campers over the last ten years, and a shift from the traditional tent camper to the fully-serviced recreational vehicle camper is a notable development. Camping facilities are no longer just provided in the countryside. Development of campgrounds near urban centres has enabled people to visit cities more economically. In addition, camping is no longer limited to the summer months.

The introduction of recreation vehicles provides the campground operator with opportunities to expand their season. Campers could be encouraged to utilize campground facilities when attending scheduled events during all seasons. The winter sports enthusiast might also be encouraged to use the camping facilities. Outdoor education programs in the school system will likely increase interest in winter activities. Winter is a beautiful time of the year to experience the wilderness. Why not promote it? Operators doing so will have some responsibility to provide special winter equipment, but outfitting on its own can be a viable operation.

It should be noted, however, there has been a recent trend back to the traditional camping experience. These campers are using Crown Land where relatively isolated sites can be found. It is difficult for a commercial operator to respond to this market group because of existing provincial legislation. Commercial campgrounds are required by law to provide certain types of services which, if implemented under the 'remote campground site' concept, would make the operation unfeasible. This type of campground operation is not recommended for the private sector at this time.

For additional guidelines, refer to Planning Canadian Campgrounds prepared by the Industry Development Branch, Canadian Government Office of Tourism, Department of Industry, Trade and Commerce.

4. Guidelines for Food Services in the Sault Ste. Marie-Wawa Zone

Generally, restaurants and dining facilities do not view themselves as tourism operations. Like most operations, they do not care where their customers come from as long as business is good. This attitude does nothing to help and, in fact, has been harmful to the tourism industry. To a greater extent, that attitude has been harmful to the restaurant industry, which is noted for its high failure rates.

A restaurant's success is almost totally dependent on the quality of food and service in relation to price. It can be located in the most out-of-the-way place, but if the food and service are exceptional, people travel to it. A restaurant operation must offer a high quality experience.

The facility's design, both internal and external, creates atmosphere. That atmosphere should be reinforced by the decor and even the menu and the writing on it. If a restaurant or dining facility is associated with another operation, both should have a consistent or compatible theme.

Dining/eating establishments have two basic markets, either the prime activity or the associated activity market. Prime activity markets refers to those who have dining as their main travel purpose. This market group would likely be composed mostly of local residents and the population within a 50-60 mile radius. The market group having dining out as an associated activity have another activity as the main motivation for travelling. Both these market groups are important to the food services industry. Each, however, requires different services.

A restaurant interested in the 'prime activity' market can expect the guests to spend a longer time at their establishment. Many will want to spend the entire evening dining. Entertainment, then, is often desirable. A cocktail lounge associated with the dining area would allow for a profitable flow of new customers.

The 'associated activity' market may desire similar services, but the duration of the stay will tend to be shorter. The 'prime activity' for this market group will determine the type of eating establishment selected. If the prime activity involves simply passing through the area to another destination, the traveller is more likely to use a fast food service facility. The business traveller, however, may desire a leisurely dining experience in a more expensive licensed establishment. Whatever the market that is being catered, consistent theming and atmosphere should be considered.

Eating establishments, like other tourism operations, are confronted with the problem of seasonality. It is, therefore, desirable that such establishments be located in or near an urban centre where the resident population base will support the operation year-round. Local resident patronage also tends to be seasonal and/or peak on weekends vs. weekdays. Supper clubs or development of packages related to other activities (i.e., supper and show specials) could be used to increase visitation. Operators of eating establishments should work closely with tour operators to encourage bus tours and special interest groups to patronize their facilities.

Within the Sault Ste. Marie-Wawa zone, there are numerous cultural groups. Currently, the ethnic restaurants are limited to Italian and Chinese cuisine. There appears to be some potential to expand and diversify the ethnic restaurants.

5. Guidelines for Retail Stores and Shops

Shopping, although not a prime activity for many, is an associated activity for practically every traveller who visits an area. Articles purchased by a traveller may be of three types; gifts, souvenirs, or general essentials (i.e., food or personal goods). From the tourism perspective, more attention is paid to gift and souvenir shoppers. It should be recognized, however, that the shopper buying essentials contributes just as much, if not more, to the tourism revenue account. It is difficult to increase the expenditure of the shopper for personal goods because his demands are predefined, whereas the demand for gifts and souvenirs can more readily be created.

Over the last 10-20 years, there has been a great influx in the development of large department stores providing a broad range of products. Recently, however, this trend has reverted to the traditional, small, specialized shop with more personalized service. These specialized shops have also created additional interest in 'window shopping', another recreational activity.

The exterior visual appearance of a retail store creates the initial interest. The exterior and interior of the shop should be themed. The theme should relate to the merchandise and also be compatible with historical or cultural themes of the area.*

*Refer to discussion on theming guidelines beginning on page 70.

The main streets of most of the communities within the zone are run down and are in direct competition with the indoor shopping malls. The store fronts on the main streets should be upgraded and themed. It is particularly important to the success of these stores and shops that the shopping areas be attractive and interesting.

The mix of merchandise is also critical to the success of a retail store catering to the visitor. A good mix of high quality and a varied price range of merchandise is desirable to appeal to a broad market. Crafts, clothing, pottery and other products made by local cultural groups and the native Indian population are big sellers in a tourism area. More development of specialty craft shops would definitely benefit the tourism industry in the zone.

6. Guidelines for Information Services

An information centre is just one very good means of distributing information to the travelling public. It services visitors already in the area and traditionally services visitors with specific requests. Information centres should be designed to entice all visitors. Attractive and themed structures are prime criteria. The insides of the centre should also be themed so as to be consistent with the exterior. Within the centre, there should be an interpretation area with exhibits highlighting the area's attractions. Samples of minerals, local crafts and illustrated dioramas would help induce the visitor to explore the area. The centres should be colourful and create an atmosphere of activity. They should be 'attractions' in themselves. Information centres in the zone should all have very similar designs themed to be appropriate to the 'accessible wilderness' image. This will enable travellers to easily recognize a centre. It will also help create the zone's image, portraying to visitors that they are in a unique and special area.

Information centres must recognize that they have four essential purposes:

- i) to serve and satisfy the visitor;
- ii) to distribute requested information;
- iii) to create further interest in the area;
- iv) to increase the visitor's length of stay in the area.

The centres' personnel must see themselves as salespeople. They must do more than just what is requested by the visitor. They must volunteer additional information and travel ideas. They must relate to the visitor, identifying what he wants to do and how much he is willing to spend.

The personnel should also consider themselves as planners, and act as trip packagers for visitors. Visitors to the centre should be identified by market type. If they are 'passing through' the zone, information on the attractions and services found close to the highway they are travelling should be distributed. This simple step just might keep many visitors in the zone for an extra night. The 'destination' traveller should be given as much information as possible on the resources in the zone which directly relate to his interests.

An information centre's success in contributing to the tourism industry depends very much on the degree of personal interest taken in all visitors. Experience has shown that senior members of a community are excellent information centre employees. They are usually proud of their community and have numerous stories of the past. They come across as being more sincere in their selling of the area.

Ideally, information centres should also act as a reservation centre. Reservations for all the zone's accommodation facilities could be made at the centre. This service helps visitors select the best establishments for him in terms of location, type, price and other auxiliary services. He is more likely to get what he really wants, thereby helping to assure the desired travel experience.

The zone's information centre locations are a major topic of concern. Centres should be located at entranceways into the Sault Ste. Marie-Wawa zone and in the heart of the destination communities. Easy access from main highways must be provided, and signs directing traffic into the centre of the communities are critical.

Every operation in the tourism industry should accept the responsibility of being an information centre. Every time a visitor stops for gas or for a meal, he should be given information on the area. Gas stations, restaurants, accommodation facilities, and other facilities associated with attractions, should all have promotional brochures on the zone. Personnel at these operations should be well informed on the zone's tourism attractions and services, and should be constantly selling the area as a unique and special place.

High quality themed road signs might also be considered for the zone. All tourism operators in the zone should cooperate in the development of the road signs. A logo could be developed which would appear on all signs, portraying to travellers that they are in the unique and special Sault Ste. Marie-Wawa tourism area.

7. Guidelines for Municipalities

Tourism, properly planned and developed, can contribute substantially to the economic and social well-being of a community. Although certain enterprises receive the bulk of the initial tourist revenues--those such as motels, hotels, restaurants, gift shops and attractions, which are wholly or mainly dependent upon tourists for their business--secondary businesses benefit as well. These secondary beneficiaries include those enterprises which rely partially on tourism but, for the most part, serve the needs of the resident population (e.g. retailers, laundries, banks). Ultimately, the community residents are also indirect beneficiaries. They share in the added dimensions of prosperity and social interaction that the tourist industry can bring.

A community must determine the functional role it wishes to establish, a destination centre or service centre. Obviously, there are advantages in being recognized as a tourist destination because visitors stay longer and spend more money. At the same time, however, a destination community must make a greater commitment in order to become a hospitable and attractive place for visitors.

Once the decision is made as to the functional role of the municipality, then planning is necessary to foster or control the growth of the industry. A macro-approach should be taken to planning for tourism. Such an approach considers all of the individual components of tourism (i.e., attractions, services, facilities) as part of the total design of the municipality in conjunction with civic planning and development functions. Taking the macro-approach is the best way for a community to effectively integrate the complementary and overlapping interests of residents and travellers. Tourism planning should be flexible and future-oriented.

Most important, tourism should be considered in the Official Plan as a separate and distinct industry. This will ensure that the tourism industry is opportune and appropriate to the community's land, labour and financial resources. Zoning should be enforced to prevent conflicts in land use.

A Municipality, planning for tourism, should adopt a special theme consistent with the overall zone image but distinctive to the community itself. It can be developed around the municipality's history, culture, industry and so on. Theming is a unifying element linking the tourism

attractions, facilities and services that are scattered throughout the community. A community should give first priority to theming the areas where substantial numbers of travellers pass by or stop (e.g., the central business district, attractions, main transportation routes).

Municipalities should undertake entrance development to introduce the visitor to the theming of the community. To create the desired impression, the entrance design can incorporate the following elements among others: signage, landscaping, screening of unattractive sights, use of local materials for structures located at the entrance.

Information/directions should be provided at the entrance to a community to make the visitors aware of the community's attractions and services and to guide them to their destinations. This information can be provided in the form of signs or in roadside travel information booths.

Communities should endeavour to increase their aesthetic appeal. Attractive landscapes, natural, cultural and man-made assets should be highlighted and visual eyesores downplayed. Building restrictions that directly address these issues must be enforced. Unsightly structures should be removed or screened. Open spaces, streets, sidewalks and roadsides should be clean and made more attractive through landscaping. This is particularly important along major traffic arteries that receive a high volume of usage by tourists (e.g., Highway #17 North and East in Sault Ste. Marie).

Travellers find shorelines and water particularly attractive. Visitors should be encouraged to utilize the shoreline. The linearity of this type of feature makes it an ideal location for trail development (i.e., bicycle, ski and walking trails).

Moreover, the community should recognize that its residents and their lifestyle are as much an attraction as special natural, historical or cultural features. Municipalities should, therefore, provide a mechanism to allow visitors to meet and interact with the local populace.

In designing for tourism, municipalities should be sensitive to the travellers unfamiliarity with the community. Dispersed attractions, facilities and services are therefore not desirable for the travelling

public and the industry suffers. Cluster development is more appropriate for tourism development (e.g. balancing strip development with more concentrated commercial development along major internal transportation networks).

- i) Certain facilities and services naturally fit together and complement one another (e.g., a number of retail services and parking should be within walking distance and connected by walkways).
- ii) Clusters offer more to do than individual developments.
- iii) Clusters represent more controlled and efficient use of space. A clustering of seasonal residences located within a municipality would facilitate servicing and make it less expensive than scattered development interspersed with permanent residences. In a seasonal cluster, a municipality is not usually required to provide snow removal.
- iv) Strip development, especially commercial strip development, along major traffic arteries, is usually unsightly and can create traffic problems.

A local tourist organization should be formed. The tourist organization should provide the strong formal link and communication channel between those benefiting directly from tourism and the indirect beneficiaries. The Chamber of Commerce appears to be the logical base for a tourist organization at the municipal level.

CHAPTER V

DEVELOPMENT OPPORTUNITIES

The following section contains specific development recommendations. These development recommendations take several forms: some involve the construction of new facilities or the enlargement and upgrading of existing ones; others pertain to the establishment of new events to act as attractions; and still others are concerned with improving the overall tourism industry in the zone through cooperation, packaging and clustering opportunities in concentrations (summarized in Table VI-2).

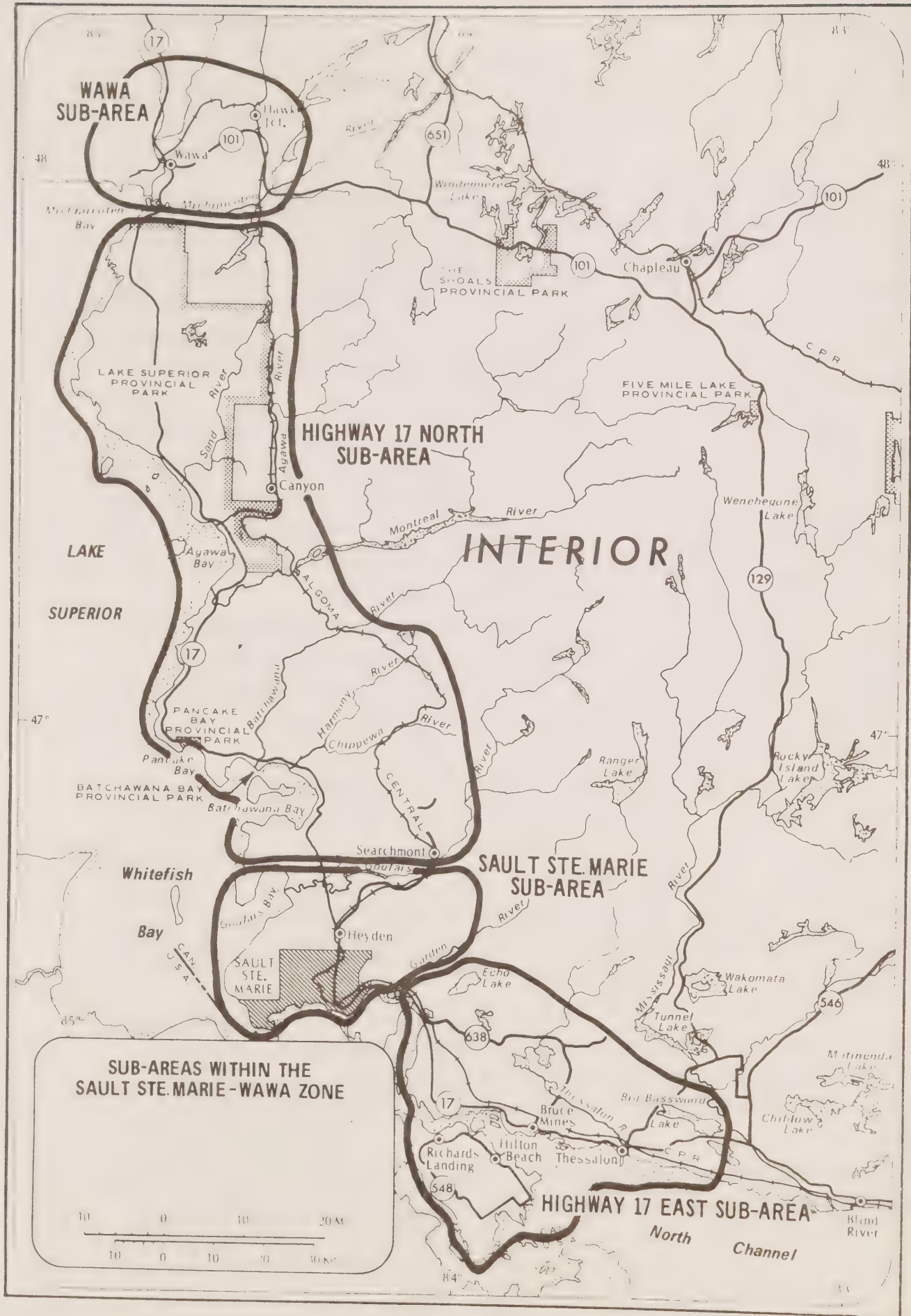
The development recommendations included in this report are those which facilitate and complement the development strategy for the zone. It is imperative that the development principles and guidelines discussed in Chapter IV be thoroughly reviewed prior to undertaking any of the development recommendations, for emphasis must be placed on how an opportunity is developed, not only on what is developed in the Sault Ste. Marie-Wawa zone.

In this section, the nature of each new commercial development is described so that the investor's feasibility analysis can be initiated more simply. Improvement of commercial developments is detailed where changes could improve profitability or enhance tourism development for the zone. Where necessary, development by the public sector is detailed.

The annual visitor estimate for each new development is based on the assumption that an aggressive publicity campaign is undertaken. These estimates are also based on the assumption that capable, high quality management is employed. Unless otherwise noted, it has been ascertained that each proposed development can get the required staff within the immediate vicinity. The capital cost estimates for each development are based on current conditions. The estimates exclude working capital.

Within the zone there are areas where the density of development varies. Many of these areas have unique features (either historical, cultural or natural resources). The zone, as a result, has been divided into sub-zone areas--each offering a mix of activities and each having individual themes (Figure V-1).

New developments are presented at two levels--zone-wide and by sub-zone. Zone suggestions are those which can apply to several locations within the



zone, while sub-zone recommendations are specific to an area. The five sub-zone areas are:

1. Sault Ste. Marie - and immediate vicinity
2. Wawa - and immediate vicinity
3. Highway 17 North - the area between Sault Ste. Marie and Wawa
4. Highway 17 East - the area between Sault Ste. Marie and Thessalon, including St. Joseph Island
5. Interior - inland portion of the zone not included in the other sub-zone areas.

1. Zone-Wide

The 'accessible wilderness' image is applicable to all sub-zones. The functional roles of the sub-zone areas differ, but collectively they serve to create an integrated tourism area having broad market appeal.

The applicability of the 'accessible wilderness' theme throughout the zone results in the ability of the various sub-zones to support similar tourism developments.

Tours--The beauty of the area provides opportunities for the development of several different types of tours. Scheduled air tours, boat cruises, and overnight rail tours are all described in Tables V-1 to V-3. In addition, an interesting package of various forms of transportation is described under the heading 'Safaris' (Table V-4).

Throughout the zone there are a number of abandoned mines. These mines played an important role in the settlement of the zone. Tours of these Old Mines could be offered (refer to Table V-5), appealing to family travellers, bus tours and special interest groups (i.e., school groups).

Outfitters--Extensive use of the natural resource base will increase the outfitting activity in the area. Several good canoeing rivers are located in the zone (see Figure A-1, in Appendix A, which describes level of skill required by river). Rivers of particular significance are:

Montreal River - starting near Chapleau to the Algoma Central Rail line. It affords beautiful scenery and fine fishing. The trip would involve 6 days;

Goulais River - from Kirby's Corner or Searchmont down to Highway #17. One or two day trips could be taken on this river. Short 1-2 hour trips could also be offered;

Batchawana River - from Batchawana Station on the Algoma Central Rail Line down to Highway #17. This river offers a 4 day canoe trip;

.Sand River - From Sand Lake on the A.C.R. line to Highway #17
This route would take 6 days and is an excellent river for
beginners.

.Mississagi River - accessible from several points on Highway #
129. This river is only good in the spring.

Canoe trips of different lengths can be offered, varying from 1 hour on the
Goulais River to 6 days on the Montreal River. Seasonal fluctuations in the
flow of water on these rivers should be checked (refer to Appendix A,
Figure A-1).

The rivers also provide opportunities for establishment of raft rides.
Although the best period for rafting is late spring when the water levels in
rivers is high, a few locations have enough water and rapids to support raft-
ing throughout the summer (see Table V-6).

Trails--The terrain offers excellent opportunities for development of
trails. The proposed trail network in Lake Superior Provincial Park could be
linked with trails at either end of the park to permit users to travel for
hundreds of miles. Trails could also run parallel to the Algoma Central Rail-
way line and down seldom used lumber roads. The provision of rustic shelters
at 15-25 mile intervals would provide overnight accommodation for travellers.
Provision must be made to permit usage in all seasons--in the summer for back-
packing and in the winter for cross country skiing. Care must be taken to
separate conflicting trail uses, e.g., snowmobilers from cross country skiers,
trail bikers from hikers. Trails should be designated for type of usage,
difficulty and length.

Fishing--Fishing currently draws a significant number of visitors to the
area. Recognizing the importance of this activity to the zone, opportunities
for successful fishing (i.e., catching a fish) must be provided. The develop-
ment of a Commercial Fish Hatchery and Trout Ponds is described (see Table V-7).
In addition to providing trout fishing opportunities, this development would
also supply fingerlings to private land owners for private stocking purposes.

An interesting commercial opportunity for the zone would be a Fish Bake
in the form of a special event. Fish Bakes could be repeated throughout the
summer (see Table V-8).

Ethnic and Cultural Events--Opportunities should also be provided for
visitors and residents alike to share customs of the local ethnic and cultural
groups. The numerous ethnic groups represented in the area present opportunities

for sharing their culture through special events. There is growing interest in the Indian culture, especially evident with overseas visitors. Every opportunity must be taken to preserve the elements of the traditional culture and to share these with other ethnic and cultural groups. It might even be possible to create a situation where visitors can live in replicated conditions of native tribes two centuries ago. Presentations of native culture must be as authentic as possible. The most evident expressions of native culture are through crafts and dancing, but there is also a great deal of interest in accommodations used, work and play patterns and family activities. Re-establishment of the annual Indian Pow-wow could serve as a significant tourist attraction, especially if the event was carefully planned and publicized.

Crafts--There is a steady demand for attractive, high quality souvenirs and local crafts. Use of native materials by native craftsmen creates an appeal identified in increased sales. Native Indian crafts are always in demand, as displayed by the success of local native crafts outlets (e.g., Agawa Indian Crafts), and other local crafts are popular (e.g., St. Joseph Island pudding stone). The area is rich in folklore and craftsmen, and should be producing more local crafts that can be marketed both from specialized shops and in other tourist stopping establishments. Quilts, apple dolls, products from local stones and minerals, maple sugar products, and wood carved products are but a few of the items for which there is continuing demand. An advantage of an industry such as Craft Production is that it can be done in homes and at the convenience of the producer.

Amusement Areas--The lack of amusements for children in the area led to the identification of an opportunity for a Themed Amusement Area (Table IV-11). Attractions of this type are extremely important to capture the family market. The resident population and seasonal residents would also provide a relatively stable base market to support such an attraction.

Accommodation--There is a current surplus of most forms of accommodation throughout the zone. Deficiencies which do exist relate to the absence of a certain type of accommodation in an area. The increasing demand for Self-Contained Units by travellers led to the identification of opportunities for this type of accommodation in two areas--St. Joseph Island and Chapleau (described in Table V-10). Other areas within the zone offer a sufficient supply of this type of accommodation, but the majority do require immediate upgrading.

Presently, the resorts within the zone tend to be small (20 units/cabins or less). The activity opportunities are limited to fishing and boating and few resorts are open year-round. Opportunities for Diversified Resorts have been identified and described in Tables V-11 to V-14. All diversified resorts have a common base. That is, they all offer accommodation, some activities and food services. Within the Sault Ste. Marie-Wawa zone, there are two concepts of diversified resorts which would be applicable. One concept is a resort acting principally as a 'base camp' for both day and overnight trips out into the wilderness (see Table V-12). This resort would act as an outfitting operation. The other concept for resorts relates more to the 'typical North American Diversified Resort', characterized by offering a broad range of activities and amenities to the guests. The activity orientation of the resort may vary, but the basic philosophy is to present a pot pourri of activities and allow guests to select from the series of activities presented. These amenity-related resorts can orient around the water (Table V-13), or around skiing (Table V-14).

Any of the resorts described in Tables V-12 to V-14 could be used as the core for the development of a Resort Community. During the initial planning of the resort, the possibilities of expanding the resort into a community must be considered. Indeed, it is possible to develop the resort and to sell or lease lots with or without structures on them, concurrently. The current weakness in the market for second residences, combined with the distance from the Sault Ste. Marie-Wawa zone to major markets, dictates that development of resort communities should proceed cautiously. Resort communities should respond in such a manner that they may develop to meet the scale of demand.

A description of the basic principles of a resort community is contained in Table V-15.* Further information about resort communities oriented towards a scheme can be found in the series of Maple Mountain reports, published by the Ontario Ministry of Industry and Tourism.

*Reference is made in the appropriate areas where different characteristics would be employed for the three types of resorts described in Tables V-12 to V-14. The one type of resort that is particularly appropriate for this zone is the unique Wilderness Gateway Resort.

Second Residence Rental Agency--Another opportunity lies in the large number of second residences that are unused during a large portion of the year. A rental agency could specialize in renting cabins during periods of non-use by the owners. Thus, the actual supply of accommodation in the area could be expanded through more efficient use of the existing cottages and cabins. The rental agency would serve as the coordinator between cottage owners and perspective renters. Some of the cottages in the area, especially those on St. Joseph Island, are very interesting, comfortable structures.

Outward Bound Program--The zone offers an ideal setting for teaching camps for outdoor activity skills, e.g., similar to Outward Bound programs. Indeed, a full range of topography and conditions are located within the zone and are within easy access of any near central location. It may be possible to refurbish one of the aging resorts as the residential setting and base for the program. A more desirable alternative would be to locate the camp near the proposed wilderness resort to take advantage of some of the facilities located at and adjacent to the resort, and to act as another point of interest for resort guests.

Visual Arts Program--The natural and historical beauty of the area makes it an ideal location for painting/photography instruction and practice. It is possible to provide a residential setting (similar to the Banff School of Fine Arts). Well-known instructors must be employed.

Refer to Table V-16 for a summary of development opportunities appropriate in more than one location in the zone.

TABLE V-1

SCHEDULED AIR TOURS

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Scheduled Air Tours 1. Short duration- less than an hour	Charge of approximately \$15/person. Flight should include viewing some scenic Lake Superior coastline Season: June-October	Should emanate from: 1.1 Downtown Sault Ste. Marie (float planes or helicopters) Take-offs and landings should be visible at the water- front in order to create interest	-Those already in the area, especially middle-aged and older couples -Passengers on the Agawa Canyon tour, lock tours, area residents, and high- way 'pass-through' traffic are key markets -Initial volumes of 20 patrons/day can be expected	Should not require immedi- ate purchase of planes, rather use surplus flying time of existing planes. As demand warrants, planes should be obtained which have better window viewing space	Float planes would experience congestion on St. Mary's River due to boat traffic
2. Half Day- including lunch/ snack on interior lake	Charge of \$30-\$40/person. Should include overflight of some scenic Lake Superior coastline, land- ing on interior lake (perhaps at outpost camp), lunch/snack, and return flight. Shuttle service should be used (fly one party to lake, return and pick up second party, return and pick up third party, etc.) Season: June-September	1.2 Wawa Should emanate from Sault Ste. Marie	Those already in area There would appear to be a demand for experiencing the 'remoteness' of a lake with no road access, but only for a short time interval. People can say that they have been in the 'wilderness' without committing a number of days to the experience. Initial advertising should focus upon those already in the vicinity (northern Michigan, Sudbury, Sault Ste. Marie)	Hourly rates vary from \$75 for a 3 seater to \$450 for a 35 seater. Floating docks for float planes will cost less than \$5,000.	Small initial market Difficult to identify and reach through advertising
3. Two Day Tour of Northern Ontario	Leave from Sault, stay overnight in Albany or Winisk (perhaps in lodges for goose hunters), return to Sault. \$160- \$250/person charge Season: June-September	Sault Ste. Marie Airport	Initially, 10 flights should be planned with an estimat- ed load of 30 patrons/flight. An interpreted flying tour of the 'northern wilderness' has wide appeal throughout the eastern and mid-western U.S.A. and Canada. Those interested include photographers, natur- alists, sportsmen, etc.	-Suitable overnight accommodation must be available -Initial promotion costs will be high	

TABLE V-2
SCHEDULED BOAT CRUISES

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Scheduled Boat Cruises 1. Short duration - less than 4 hours, usually 1½-2 hours in length	An interpreted boat tour along the Lake Superior or Lake Huron shoreline, concentrating upon the natural beauty and the interesting developments (e.g., old cottages, freighter channels, etc.). Verbal interpretation during the cruise is of special importance to ensure passenger enjoyment. It should be as personal as possible (not mechanical or "canned") and should include discussion about natural processes, historical development, and topical concerns. Tours should operate from early morning to late evening in order to accommodate 'pass-through' traffic wanting to experience the tour, yet also wanting to continue their travelling. Ideally, the boat used would be capable of conversion to other uses, (e.g., commercial fishing) when the summer tour season finishes. Docking facilities should be as visible as possible in order to encourage tour attendance. Location adjacent to, or as part of, a resort, amusement facility, marina, etc., is preferred. Adequate parking must be available for all patrons.	a. Near Wawa: at the site of the proposed marina or near the government docks in Michipicoten Harbour b. Batchawana Bay: at the site of the proposed marina (near Batchawana Bay Provincial Park) c. Lake Huron: on the St. Joseph Channel near either: i) the bridge to St. Joseph Island, or ii) Desbarats, or on the North Channel at Bruce Mines or Thessalon	Consists of visitors already in the area. Prime groups are lock viewers, train tour passengers, hotel/motel/resort/cottage/campground guests and 'pass through' traffic on Highway 17. Families and groups of adults (e.g., retirees, couples) are main users. Market estimates for the first year of operation are: a. Wawa - 14,000 tickets sold, mainly from overnight guests at motels/hotels; b. Batchawana Bay - 18,500 tickets sold, mainly from overnight guests in Sault Ste. Marie c. Lake Huron - 11,400 tickets sold, mainly from overnight guests in Sault Ste. Marie.	Tour boat costs range upwards from \$110,000, although conversion of existing vessels could reduce costs. The major capital cost of the tour boats can be offset if the boats can be used: (1) for other purposes, e.g., commercial fishing, or (2) in other locations during the winter, e.g., warmer climates. Accommodation must also be made for passenger parking, ticket sales, docking and storage.	-The short operating season. -Weather and the resulting lake conditions will occasionally force cancellation of tours on Lake Superior. -Regulations vary with the type of operation (e.g., travelling more than 5 miles from shore) and vessel. Check with the Office of Ship Safety, Transport Canada, for current regulations.

(continued)

TABLE V-2 (continued)

SCHEDULED BOAT CRUISES

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST	ESTIMATES	CONSTRAINTS
2. Full Day	<p>Similar to short duration cruises, with the added feature of more distance (and scenery) travelled, and on-board food services.</p> <p>It is possible to assemble a multi-mode transportation package, including a full day one way cruise.</p> <p>e.g., from Sault Ste. Marie to Wawa by: -rail (Algoma Central Railway to Hawk Junction) -Highway 17 (bus or rented auto) -Air (NorOntair or charter)</p> <p>Stay overnight in Wawa and return to Sault Ste. Marie on the cruise the following day. Of course, equivalent tours would originate in Wawa to provide passengers for the return trip.</p> <p>Eventually, special interest cruises (e.g., scuba diving) could be offered.</p>	<p>a. From Wawa: i) to Michipicoten Island and return, including a shore lunch at Quebec Harbour ii) To Pukaskwa National Park and return iii) To Sault Ste. Marie (one way)</p> <p>b. From Sault Ste. Marie: i) To Wawa (one way) ii) Around Whitefish Bay and return iii) To St. Joseph Island and return, including a shore lunch on the island.</p>	<p>Essentially the same market as the Agawa Canyon train tour. Organized group tours from southern Ontario, Michigan, Ohio, Indiana and Illinois will be an important source of users. Local residents and a small proportion of the 'pass through' traffic will account for 15-20% of the total usage.</p> <p>The number of users is highly dependent upon the advertising campaign and the success in packaging tours.</p>	<p>Tour boat costs range upward from \$200,000 for 175 passenger capacity</p>	<p>Same as above, plus the cost of a major advertising campaign in the urban centres around the Great Lakes.</p>	
3. Two or more days	<p>Cruises involving at least one night's accommodation may take two forms: a. similar to ocean cruises - passengers sleep in staterooms on board ship. Ships used must have all of the services of ocean cruise ships</p>	<p>a. Would likely originate from Toronto, Detroit or Chicago, but a cruise from Sault Ste. Marie to Thunder Bay (perhaps stopping at Isle Royale) and return should be considered.</p>	<p>The current cruise market of couples and single adults would be further reduced by the high price which must be charged. If the cruise could be oriented towards families (e.g., cafeteria, high quality children's program, etc.), the size of the market greatly increases.</p>	<p>The high capital cost of passenger liners requires usage of vessels currently in operation elsewhere.</p>	<p>-Operating costs of ocean liners are very high. Great Lakes cruises would have difficulty competing with the price of Caribbean cruises.</p> <p>-High capital cost of vessel</p> <p>-High advertising costs during first few years of operation</p>	

(continued)

TABLE V-2 (continued)
SCHEDULED BOAT CRUISES

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
3. Two or More Days (continued)	b. Overnight accommodation provided on land - the ship is used to transport passengers from one overnight location to the next, with sightseeing en route. It is possible to assemble a relatively low-cost package using inexpensive accommodation (e.g., motels, camping), and a ship with small passenger capacity. Cruises of varying length could be offered, and the theme of the cruises could be the lack of rigid planning for them (e.g., "We camp overnight wherever we end up at the completion of the day's sightseeing and fishing").	b. would originate from: i) Sault Ste. Marie to travel north into Lake Superior or among the islands in the North Channel ii) Wawa to travel west or south along the Lake Superior shoreline	Would consist of 'adventures' with some flexibility in the time available for the cruise. (e.g., young adults, students, a few retirees). Patrons would primarily come from throughout the northeast and midwest portions of the continent, although the cruise would have appeal world-wide. The estimated number of patrons is 500 for the first year of operation.	Conversion of an existing vessel would reduce the capital costs. Otherwise, since a relatively small number of patrons is one of the main 'draws' of this cruise, a new vessel would cost \$80,000+	Small initial market
4. On 'Non-Passenger' Vessels	Since ships classified as non-passenger vessels (e.g., freighters) are permitted to carry up to 14 passengers, it is possible to offer cruises on 'working' freighters. There would have to be some flexibility in scheduling passenger traffic to allow for the time variations in a freight operation (e.g., delays in loading and unloading). Ship owners must be convinced that a limited passenger operation can be conducted on a profit basis and passengers must be prepared to 'rough it' for the opportunity of travelling on a working freighter.	If passengers could embark while the ship is in the locks at Sault Ste. Marie, it is possible to travel to the destination of that particular ship. Other points of embarkation could include the docks at Algoma Steel Corp. (Sault Ste. Marie) and at Michipicoten (near Wawa).	Same as above, with an estimated 200 patrons during the first year of operation.	If passenger facilities are already located on board, few additional capital costs will be encountered.	-Passengers on board will require modification of crew behaviour in some cases, and the program will have to be tried on an experimental basis.

TABLE V-3
OVERNIGHT RAIL TOURS

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Overnight Rail Tours	Rail tours can be combined with various forms of overnight accommodation to create a package of tour days. Overnight accommodation can be offered in railway cars, resorts and cabins beside the track, and even by tent camping.	Various - the Algoma Central Rail Line between Sault Ste. Marie and Hearst provides many opportunities for overnight stays. The most popular spot would likely be the Agawa Canyon because of the reputation derived from the Agawa Canyon Train Tours. The CP and CN lines also provide locations for this type of experience.	The popularity of the Agawa Canyon Train Tour is an indication of the relative popularity of train tours. People would travel farther for an overnight train tour than they would for the Agawa Canyon Tour. The northeastern portion of the continent and overseas would provide the vast majority of users. Prime market would be southern Michigan, Ohio, Indiana, Illinois, southern Ontario and New York. Participants would be adults, singly or in couples. Most would be over 35 years of age.	Few additional capital costs would be sustained through the use of existing railway stock and resorts/camps. If railway cars are used, some may have to be equipped with compressed air tanks, etc., of sufficient capacity to sustain two nights independent of steam generators, compressed air and electricity sources. When the overnight stay is on rail, boats, canoes, fishing and backpacking equipment, etc., may have to be purchased if other arrangements cannot be made to supply guests with those items.	An extensive publicity campaign would be required
Rail Tours combined with overnight accommodation	Railway business cars, providing accommodation and food service for up to 12 people, are ideal means of accommodating small groups on rail sidings. Through the use of sleeping cars and the conversion of available cars into sleeping cars, accommodation can be provided for groups of 20+ per car. Cars may be parked on sidings for one or more days, providing occupants with the opportunity to hike, fish and generally enjoy the surroundings. Boats, canoes, fishing tackle, backpacking equipment, etc., should be supplied to guests interested in these pursuits.				
	An overnight stay on rail in the Canadian wilderness would have appeal to both railway buffs and those interested in a unique wilderness experience, but comfort would be of essence.				
	Charges of \$100+ per day could be made for the experience.				
	Combining the rail trip with a stay at a resort or camp adjacent to the rail line would provide yet another interesting tour package. A reasonably wide choice of activities should be available at the point of the overnight stay. Activities must include indoor activities (e.g., backgammon, cards, dancing, etc.) to occupy guests in the evening or when weather conditions are poor. Groups could even be dropped off to tent camp at lakes, with arrangements to be picked up by rail on the appropriate date.				
	Prime season would be May through September, with some possibilities of offering the rail/resort combination during the winter.				

TABLE V-4
SAFARIS

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Safaris	Safaris would utilize various modes of transportation to transport participants through a demanding, yet comfortable, schedule of activities. Each safari would have a theme and would be led by an acknowledged authority associated with that theme, e.g., photography--acknowledged natural resource photographer; wildlife viewing--wildlife expert. A small group of participants on each safari would have an ample number of interpreter/guides with them so that each individual would perceive that he was receiving individual attention. Even though the safari might be rugged, comfort of patrons is an essential ingredient. Patrons must feel as though they are 'roughing' during the daily travels, yet meals and portable overnight accommodation should be comfortable, e.g., linen and silver at meals, comfortable camp beds, etc. Potential participants must be informed in advance and in detail about all aspects of the safari so that they know exactly what to expect.	Should originate from Sault Ste. Marie or Wawa, both centres having scheduled air service. Safaris could travel throughout northern Ontario and Quebec.	The market for a safari into the Canadian wilderness would be world-wide. Those serving the foreign traveller must provide guides/interpreters who are conversant in the required languages. Participants would be adults, singly or in couples. Most participants would be over 35 years of age. A secondary market exists for family groups. Market size is highly dependent upon the amount and nature of publicity. It is estimated that as many as 150 patrons could be expected during the first year of operation. Word-of-mouth advertising by the initial participants will be a major factor in increasing the number of participants in succeeding years. Since one of the major attractions of the safari is that it is limited to a small number and not available to the mass markets, care must be taken to keep group sizes relatively small.	Capital costs are dependent upon the modes of transportation used during the safari. Four-wheel drive vehicles (6) would cost \$55,000, although these might be leased in order to reduce capital cost. Travellers during the late spring must consider the black flies. Summer water levels might inhibit the canoeing and rafting aspects of the safari.	Publicity costs would be high during the first few years of operation. Getting sufficient numbers for each safari to be economic will be difficult in the early years.
Unique					

TABLE V-5
TOURS OF OLD MINES

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
<p>Tours of Old Mines</p> <p>There are many old mines in the zone, especially in the area around Wawa and north of Bruce Mines.</p> <p>Tours of the abandoned mines within the zone could be of interest, especially if the above-surface works are still standing.</p> <p>The interest in mining can be stimulated with regularly scheduled tours.</p>	<p>The tour should include above surface works and a sub-surface visit as well.</p> <p>It should include an interpretation of how the mine was located in a particular spot, its historical development, any strange or unusual occurrences that may be of interest.</p> <p>The visitor should be encouraged to do some rock hounding in the tailing heaps and could be given a sample of mineral bearing rock.</p> <p>The tour could be conducted by public groups (e.g., parks and recreation, Y.M.C.A.), educational groups (such as the four tours offered during the summer by Algoma College in Wawa) or by commercial interests.</p> <p>The enjoyment of the tour rests as much on the personality, charm and knowledge of the tour guide as it does on the actual physical site.</p> <p>The tour should be 1/2 to 1 day in length, including travelling time, and could involve visits to several mining sites.</p> <p>Tours can occur at scheduled times during June, July, August and September.</p> <p>Advertising for tours should be placed in all accommodation operations and in other places where pass through traffic and destination traffic will be contacted.</p>	<p>Potential sites for mine tours include</p> <ul style="list-style-type: none"> -the seven gold mine site south of Wawa Lake -the copper mines north of Ophir and at Bruce Mines -the copper mines north of Batchawana Bay 	<p>The market would be comprised of persons of all ages travelling through or coming to the zone.</p> <p>Tours would be of interest to specialty groups (e.g., school groups).</p>	<p>Cost would include:</p> <ul style="list-style-type: none"> -Renovations to ensure the stability and safety of existing structures -Development of better access to the mine sites 	<ul style="list-style-type: none"> -Safety could be a problem. -Care should be taken to check with mine owners as most mines are still in private ownership. -It might be difficult to get permission for sub-surface visits. -The capital costs of stabilizing the mine shaft to permit underground visits may be prohibitive.

TABLE V-6

RAFT RIDES

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
1. Short Duration (Approximately 1 hour)	<p>This ride down Whitefish rapids would have the appeal of an amusement ride. Each rubber raft can seat 10 people plus the guide/interpreter. Larger rafts are available with a capacity of 20+ patrons.</p> <p>The trip would begin at the upstream end of Whitefish Island, below the bridge. After travelling through the rapids, the boat and passengers can be returned to the starting point by travelling back through the Canadian locks. Embarkation/debarkation can be in the upstream of Canadian lock channel (near the vehicle parking area) or from the upstream end of Whitefish Island.</p> <p>Rafts should be equipped with a small motor to be used for the return journey through the locks. The operating season would be from mid-June to mid-September.</p> <p>At least three rafts would be needed to ensure a short waiting period for embarkation.</p> <p>Cost per patron of \$3.00-\$6.00</p>	Sault Ste. Marie Whitefish Rapids	<p>.Being on the waterfront it will be visible to the 885,000 people who visit the locks on the American side as well as those visitors to the locks on the Canadian side.</p> <p>.Target market would be the young to middle-age.</p> <p>.Estimate minimum of 100 persons/day - 90 day season = 9,000 persons/season</p> <p>.Resident market will also participate</p>	Three rafts plus motors plus lifejackets should cost approximately \$15,000.	.Dependent on whether or not the Hydro plant is developed on the rapids.

(continued)

TABLE V-6 (continued)

RAFT RIDES

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
2. White Waters Trip (4 to 8 hours)	This trip could cover from 2-4 miles of river and would include lunch. Cost per patron of \$12 - \$20	a. Batchawana River - immediately north of Highway #17. Access via Forestry Rd. b. Magpie River-- portions of the stretch of river from Dubreville to Steephill Falls. Access is via private road (permission must be obtained for usage). The most outstanding stretch of water is from Toolong Rapids through four more chutes downstream. c. Goulais River-- north of Searchmont	The target market would be young through middle age, located in the urbanized areas surrounding the Great Lakes. Pass through traffic and other visitors to the zone would also be prime clientele for a single day trip. An estimated 400 persons would engage in this activity during the first year of operation.	Same as No. 1 Larger rafts, with greater passenger capacity would increase costs to a range of from \$24,000 - \$34,000.	Seasonal fluctuations in water level may confine this activity to spring (May, June) when the water is cold. This activity requires preplanning and weather might create a problem in prescheduling.

TABLE V-7

COMMERCIAL FISH HATCHERY AND TROUT PONDS

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Commercial Fish Hatchery and Trout Ponds	The operation would consist of an indoor hatchery and rearing area, outdoor rearing tanks and trout fishing ponds.	Adjacent to Highway #17, as close to Sault Ste. Marie as possible.	The market for the trout ponds would include any visitor within the zone or in the immediate region.	Structure and hatchery rearing tanks \$100,000	Operation of a fish hatchery and sale of stock are subject to stringent regulations
Although provincial hatcheries are permitted to sell excess stock, all of the output of the Tarentorous Fish Hatchery has been used in recent years for stocking programs to provincial waterways. This condition is not likely to change in the near future.	Trout could be supplied to property owners who qualify for stocking. * Fishing tackle and bait should be on hand for rental at fishing pond to permit the casual fisherman to try his luck. Facilities could be provided nearby so that those who fish can have their catch cooked and a small meal served (cooking tent, sheltered picnic area would suffice).	A sufficient supply of high quality water must be available year-round.	The market for the fish hatchery would be property owners and other trout pond operators in the region.	Outdoor trout rearing tanks (4) \$80,000 Trout fishing pond--dependent upon alterations of the natural terrain	supervised by the Ministry of Natural Resources. Check with the local office for current regulations.
	Advertising should be located in all accommodation operations and in other places where the visitor will be contacted.				

*Check with the local office, Ontario Ministry of Natural Resources for appropriate regulations.

TABLE V-8
FISH BAKE

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
<p>Fish Bake</p> <p>An outdoor fish bake would be an opportunity to feature fresh fish caught by the commercial fishermen in the area.</p>	<p>The fish bake would take the form of an outdoor barbeque with freshly caught native fish (served raw, boiled, fried, baked or barbequed) comprising the highlight of the meal. This meal could be complemented by roasted corn and beans baked underground in the traditional manner.</p> <p>Local entertainers could present some of the local flavour of the area. Entertainment could include performances by folk singers, Storytellers could elaborate upon the area's history, the fishing industry and local folklore and legends.* A sing-along could be conducted around an evening campfire.</p> <p>This event should present an opportunity for visitors to interact with local residents and with each other.</p> <p>The fish bake presents an ideal opportunity to promote charter fishing trips and scheduled boat tours along the lake shorelines.</p> <p>The event should be held during the summer months. If successful, it should be scheduled at regular intervals throughout June, July, August and possibly early September.</p> <p>The fish bake should be a half-day in length, beginning in the afternoon and culminating with an evening campfire.</p> <p>Group transportation could be provided to the location of the fish bake.</p> <p>Promotional literature and information should be available in all accommodation operations and in other places where pass through and destination traffic will be contacted.</p> <p>Admission should be charged to cover the costs of the meal and entertainment.</p>	<p>The location of the fish bake would ideally be a waterfront, park (i.e., natural) setting situated in proximity to any of the population centres within the zone. Parking facilities must be available at the site.</p>	<p>The market would be comprised of local residents and visitors to the area. This event could be incorporated into a tour. It would be of interest to all age groups and have great popularity with families. It is possible, with sufficient promotion, to have 700+ patrons over the season.</p>	<p>Costs would be minimal, needing to cover only the purchase of food, utensils, entertainment and group transportation. Full time workers would not be required for this venture, yet it is revenue producing.</p>	<p>An advantage of this event is that there are virtually no constraints but for weather, which constrains most outdoor activities.</p>

*Organized games (e.g., softball, races, relays) offer afternoon entertainment.

TABLE V-9
THEMED AMUSEMENT AREA

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Themed Amusement Area	Several rides and activities would be offered, each constructed and presented in a manner consistent with the overall northern wilderness theme of the area. For example, a log flume ride could exemplify some of the lumbering history of the area, a rail ride could replicate a journey through a mine and a miniature train could illustrate the activities of the Algoma Central Railway. A miniature golf course could be constructed to replicate some of the difficulties encountered in the construction of Highway #17 from Sault	Best location would be within the immediate vicinity of Sault Ste. Marie. Smaller scale amusement areas could be developed in other communities.	Families and children of all ages. As there are no other amusement areas in the region of Sault Ste. Marie, the market would be visitors in up to a 200 mile radius. If there were at least six rides and activities located in the amusement area, 200,000+ visits could be expected during the first year of operation.	Cost of the rides and activities would vary according to the scale of each. Based on the purchase of all new equipment, here are some targets: -Adapted merry-go-round \$70,000 -Log flume ride \$800,000 -Mine rail ride \$200,000 -Miniature train ride \$700,000 -Themed miniature golf \$25,000 -Canoe float ride \$35,000 -Ponies and wagons \$10,000 -Land cost would be additional to the rides. -Building for repair, storage and snack sales and washrooms \$70,000 Total costs for this development would be at least \$1,000,000 with additional costs dependent upon the number and scale of rides.	The season is short--latter part of June, July, August and first part of September. The annual maintenance and related storage costs are high for rides and attractions.

Ste. Marie to Mawa, each hole bearing the name of an obstacle and constructed in such a way that the sinking of the golf ball represents the solution to the obstacle. A merry-go-round can be presented with native animals to ride upon, a float ride could be made in small canoes to indicate the importance of canoe traffic in the settlement of the area. Pony rides are a natural amusement. Opportunities to have pictures taken against various backdrops can be offered, and there could even be a trout fishing pond.

The area should have a park-like rather than carnival setting, perhaps including a play area for small children, and picnic areas. For evening entertainment such as dancing/concerts, a stage area could be constructed.

Snacks should be available at the area. Souvenirs, local arts and crafts should also be available, perhaps in a trading post setting. The wrong approach would be merely to assemble a series of existing carnival rides (e.g., bumper cars, traditional merry-go-rounds). Rather, constructed rides should be themed to the development of the area.

Attention must be paid to changing portions of the area at intervals in order to encourage more repeat visits.

TABLE V-10

SELF CONTAINED ACCOMMODATION, KITCHEN AND SLEEPING FACILITIES COMBINED

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Self-Contained Accommodation, Kitchen and Sleeping Facilities Combined	<p>Individual units containing sleeping facilities, washroom and kitchenette. Each unit will have 200-450 sq. ft.</p> <p>Activities such as boating may be provided by the operator of the accommodation units.</p> <p>A central lodge may be provided in which the guests can meet and enjoy indoor games on evenings and in inclement weather.</p> <p>A minimum of 10 units should be provided and additional units should be added as demand warrants.</p> <p>The structural design of the units should be compatible with the sub-zone/zone theme.</p> <p>The prime operating season is from June through October.</p> <p>For additional information on the planning, construction and operation of accommodation operations see the <u>Im Business</u> published by the Canadian Government Office of Tourism</p>	<p>1) On St. Joseph Island</p> <p>2) Chapleau Vicinity</p>	<p>Primarily families who wish to stay in the area for a few days.</p> <p>The prime market would be southern Michigan, although the entire urbanized area around the Great Lakes would provide patrons.</p> <p>The lack of available accommodations on St. Joseph Island currently discourages visitors from remaining for any length of time.</p>	<p>The cost of 10 individual units plus an office area would be in the vicinity of \$220,000.</p> <p>Provision of activity equipment, landscaping and parking would add an additional \$15,000 to the cost.</p>	<p>Initially, a relatively short operating season can be expected.</p>

TABLE V-11

DIVERSIFIED RESORTS - BASIC PRINCIPLES FOR ALL DIVERSIFIED RESORTS

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Basic Principles for all Diversified Resorts	The attraction of the resort must be a combination of the natural resource setting, the various activity opportunities for all ages and the leadership offered to 'guide' and instruct the patrons in activities interesting to them.	Must be located adjacent to a major transportation route affording year-round travel. It must have road access, although publicity may emphasize another mode of access, e.g., rail.	The major market would be family groups, although it is possible to build up a clientele of tour bus guests. This would require careful scheduling of tour bus groups so as to be able to serve other clientele and tour groups concurrently. Over 300 tour buses enter Sault Ste. Marie each year, the majority staying overnight in Sault Ste. Marie or vicinity.	Main building (assuming 30 units) plus dining room, kitchen, activity room(s), meeting room(s), fireplace, lounge area, lounge/bar, retail sales of local crafts and supplied - costs for this structure would range from \$450,000 to \$700,000.	-Essentially a summer operation with the possibility of extending into the shoulder seasons -The physical layout must be handled with extreme care so that the many different interest groups can pursue their activities without interfering with each other and so that guests feel no sense of crowding.
Specific Resorts are outlined in the following 3 Tables, with expansion of the resort into a resort community outlined in Table V-15	The specific types of activity opportunities offered depends upon the nature and theme of the resort. However, it is safe to state that swimming, tennis and low organization indoor activities (e.g., chatting, cards) are popular with the majority of resort guests.		Local corporations and service groups have utilized resorts in the past for some of their smaller meetings. Good food service, combined with an attractive setting and meeting rooms, could encourage more future business of this type.	Other Facilities: Garage/workshop area - \$16,000 Tennis Courts (2) - \$22,000 Self-contained accommodation units (ea.) - \$20,000	-Diversified resorts are labour intensive enterprises. The availability of staff will be directly dependent upon the distance from population centres. The more remote resorts may therefore face staffing problems.
	Accommodation should be available for at least 60 people, permitting the resort to be used by both bus tour groups and other patrons. Lodge (similar to a hotel) or isolated units which have kitchen facilities.				
	Central lodge - should be a winterized unit which contains a minimum of 30 sleeping units, with dining and cocktail facilities and meeting rooms.				
	Retail space should be provided within the main lodge for the sale of general confectionary merchandise (e.g., personal essentials and groceries) and souvenirs and local crafts.				
	A wide selection of food services should be available. Meals should be served at the dining room and also (optional) delivery to the isolated accommodation units. Those living in the self-contained units have the kitchen facilities to prepare their own meals.				
	Although the resorts will initially operate only during the summer season (May through September), they should be designed and constructed in such a way to permit winter usage when demand warrants.				

TABLE V-12

WILDERNESS GATEWAY RESORT

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Wilderness Gateway Resort	<p>Contains characteristics contained in Table IV-13, Basic Principles for All Diversified Resorts.</p> <p>The resort should create a theme sensitive to the natural and historical resource base, in addition to acting as the 'end of the road' or gateway to the wilderness.</p> <p>Requires access to a large undeveloped land area because of extensive nature of activities offered.</p> <p>It must have a rustic appearance with logs and stone used as construction materials. Surroundings can be simple, but must be clean, functional and comfortable.</p> <p>The emphasis here would be upon simple living and the range of learning and participation opportunities for extensive outdoor recreation activities. The attraction is the combination of outdoor activities offered for both instruction and participation. Instruction could be given in activities such as backpacking, canoeing, climbing, horseback riding, fishing, cross country skiing, snowshoeing, ice fishing, wildlife viewing, photography and wilderness survival training. These programs should be designed to appeal to family groups, people of all ages and skill levels. The experiences must be of a high quality. This requires competent instructors/supervisors.</p> <p>Indoor recreational facilities should be provided in case of inclement weather and for evening entertainment.</p> <p>The resorts would have a variety of equipment for activities on hand, thereby acting as outfitters and instructors.</p> <p>It should be possible to remain at the resort for an entire vacation and to participate in different activities each day. It should also be possible to use the resort as a base camp, and to include two or three nights' stay in camps away from the resort in the middle of a week-long visit.</p> <p>Air tours (using float planes), and excursions by other modes (i.e., canoes, horses, all terrain vehicles) into the wilderness could be scheduled by a tour broker operation located on site.</p>	<p>Prime locations are two areas: -north or east -of Batchawana Bay;</p> <p>-north of Bruce Mines/Thessalon</p> <p>The Wawa area also offers potential.</p>	<p>Market would primarily be families or couples empathetic to the outdoors and desiring to hone or practice their outdoor activity skills. Specialty markets could include young adults, school groups, photographers, painters.</p> <p>It would be possible to accommodate bus tour groups at a resort of this type, although the group should be the type which participates in activities, not just using the resort as merely overnight accommodation.</p> <p>Primary potential markets are local and area residents, residents of highly urbanized states bordering the Great Lakes and overseas visitors.</p>	<p>As outlined in Table IV-13 with, perhaps, a slight reduction in costs due to the rustic nature of the resort.</p> <p>The equipment used in outdoor activities must be available. The first year of operation (providing only basic extensive recreation opportunities, i.e., hiking, canoeing) will require a minimal capital outlay of \$10,000.</p>	<p>Construction of access roads would be extremely costly.</p> <p>A resort of this type would be labour-intensive due to the requirements for guides/instructors. The constraint of operation during the winter season for the first two years would require a large promotional campaign. It might be financially feasible to only operate the resort during the summer season for the first few years and then open it during the winter as a repeat clientele is built up and as word-of-mouth promotion about the high quality of the operation begins to create a winter market (refer to Table IV-13 for additional constraints.)</p>

TABLE V-13

DIVERSIFIED WATER ORIENTED RESORT

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Diversified Water-Oriented Resort	<p>This resort incorporates all of the general characteristics of the diversified resort (refer to Table IV-13)</p> <p>It would focus around instruction and participation in water-based activities such as swimming, sailing, houseboating, yacht towing, water skiing and scuba diving.</p> <p>Instruction and equipment rentals would be a substantial part of the resort operation.</p> <p>A marina would be an integral part of the operation, serving both resort guests, local residents and touring boaters.</p> <p>In this type of resort, medium density accommodation (e.g., clustered rather than isolated self-contained cottage units) would provide the alternative living facility to the central lodge. Boats could provide another form of accommodation.</p> <p>An attractive sand beach area would add greatly to the resort's appeal. There should be a heated swimming pool and sauna bath in addition to the recreation facilities suggested for diversified resorts in general (i.e., tennis, low organization indoor activities).</p> <p>This type of resort should be geared to offering a social experience. Resort facilities (e.g., lounge, pool area, beach) should be designed so as to facilitate interaction among guests.</p> <p>It would obviously have to focus on an extended summer season (May to mid-October). Once a steady summer clientele is established, winter activities could be added to make this a year-round operation.</p>	<p>This resort should be located where there is access to an extensive waterfront area on the Great Lake shoreline.</p> <p>Two locations that offer virtually all of the environmental requirements of this type of operation are:</p> <p>1) St. Joseph Island (Highway 17 East Sub-Zone)</p> <p>A location at the upper end of St. Joseph Island or on the shoreline between Bruce Mines and the St. Joseph Island Bridge would be ideal. Easy access is provided through Highway #17 and yet there is the feeling of seclusion because the resort would not be located immediately adjacent to the highway.</p> <p>2) The Batchawana Bay Area (Highway 17 North Sub-Zone.)</p>	<p>People of all ages who are seeking instruction in water-oriented activities and essentially a social experience in a resort setting.</p> <p>Family groups would be the prime target market.</p> <p>Bus tour groups, special interest groups and business conventions represent other potential markets.</p> <p>Would also be a 'stop over' spot for transient boaters.</p> <p>Local and area residents, residents of the large organized areas in the states bordering the Great Lakes and the overseas visitors could become patrons.</p> <p>Day and evening use by local cottagers.</p>	<p>Capital costs would be as outlined for the diversified resort in general (refer to Table IV-13)</p> <p>In addition, there would be the following capital costs:</p> <ul style="list-style-type: none"> -Marina facility \$60,000 -Heated swimming pool \$15,000 -Purchase of boats and rental equipment for initial year of operation \$35,000 -Additional boats can be added as demand warrants 	<p>The swimming season in this area is comparatively short (July, August). The water temperatures in the Great Lakes especially Superior are generally too cold for comfortable swimming. Only certain areas on Batchawana Bay are suitable for swimming.</p> <p>It may be difficult to acquire the large waterfront area required for this type of resort.</p>

TABLE V-14

DIVERSIFIED SKIING ORIENTED RESORT

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Diversified Skiing-Oriented Resort	<p>Characterized by offering a broad range of activities and amenities.</p> <p>The orientation of this 'resort' would be towards the winter activities of cross country and downhill skiing, snowshoeing, ice fishing, snowmobiling and others.</p> <p>During the summer, the activities would be similar to those activities basic to a Diversified Resort (Table IV-13), plus additional urban-oriented, intensive recreational facilities (i.e., golf course).</p> <p>The basic philosophy is to present a 'pot pourri' of activities, allowing guests to make selections.</p> <p>The theme of the resort should be 'serviced wilderness' using natural wood materials in the construction design (it should not adopt the typical Alpine theme).</p> <p>If a new ski area is developed, it is important that additional accommodation is provided nearby.</p> <p>Most successful ski operations are those which have a large population base nearby in order to provide the necessary volume of daily skiers.</p> <p>Accommodation facilities could be clustered and should be designed to encourage social interaction.</p> <p>Facilities included: chair lifts and tows; central chalet with tavern; trails used for winter activities and hiking in other seasons; shelters along trails; indoor swimming pool and saunas.</p>	<p>Resort may be located adjacent to an existing ski area (i.e., Searchmont), or may be built in an entirely new ski area:</p> <p>a) Batchawana Mountain; b) Mamainse Hill c) King Mountain</p> <p>Should be accessible to a lake.</p>	<p>Potential markets would include:</p> <p>Winter--Ski Clubs from Ontario, Michigan, Ohio and other Great Lakes states, day skiers, residents of northern Ontario and upper Michigan</p> <p>Attract winter family vacationers</p> <p>Would appeal to single adult market</p> <p>Summer--Bus tours, family vacationers from Ontario and Great Lakes states.</p> <p>Year-Round--could service business meeting and convention markets.</p>	<p>For ski hill - in neighbourhood of \$5 million for clearing and hill development</p> <p>-lift construction</p> <p>-snowmaking system</p> <p>-grooming equipment</p>	<p>Numerous intervening opportunities (resort must be exceptional)</p> <p>Because of the distance from major markets, travel by modes other than auto will be required.</p> <p>Weather constraints - can be too cold in winter for comfortable skiing.</p> <p>Slow return on investment because of large initial capital costs.</p> <p>Access roads to a new resort would have to be built.</p>

TABLE V-15

RESORT COMMUNITY - EXPANSION OF DIVERSIFIED RESORTS

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Resort Community (Concept - selling or leasing lots with or without structures on them). To be incorporated into one of the Three Diversified Resorts -Wilderness Gateway Resort -Diversified Water Resort -Diversified Ski-Oriented Resort	With careful planning it would be possible to locate residential lots near the diversified resort to use the resort as a focus for a community of second residences. All planning must recognize the essential importance of the natural resource base and all components and activities must be designed to protect and enhance the quality of the natural environment. The land mass must be large to allow separation of incompatible activities and the clustering of compatible ones. A resort community is a larger scale operation than a diversified resort, and should offer a higher level of facilities and services. In order to expand one of the three resort concepts into a Resort Community, a broader range of activities appealing to a larger market group must be considered. Additional activities should be compatible with those offered at the affiliated diversified resort. The Resort Community should adopt the theme used at the diversified resort in its affiliated with and should be represented in the physical layout and structures. Stringent building restrictions should ensure that all accommodation units conform in appearance to the overall theme of the community. These units should be winterized. Accommodation for families should be the primary emphasis, recognizing the activity and service needs of different ages. Additional accommodation forms could be: Group Bunk Houses--these would provide low price accommodation for students and teen age groups; Campground sites--the endeavour must be made to minimize potential conflicts between those who wish to enjoy a camping experience and the other groups residing in the area. This can be accomplished by careful choice of site location and design. A resort community focussing on the Gateway Wilderness Resort concept would be essentially characterized by low density development (isolated self-contained cottage units). Over time, medium density development (i.e., cottage clusters, campgrounds, group bunkhouses) could occur if extreme care is taken to buffer them from low density areas. In resort communities built around the diversified skiing or water-oriented resort concepts, development would essentially be comprised of medium density accommodation forms. Over time, high density condominium development could be added. Again, care must be taken to avoid conflict with the lower density area. Within the Resort Community, facilities which directly service the community will be required. These facilities include variety and grocery stores, laundry facilities, recreational centre and a souvenir/gift shop.	Locations within the zone that offer the required high quality natural setting, variety of environmental resources and large land area include: 1) The area north or east of Batchawana Bay; 2) The area north of Bruce Mines/Thessalon.	The resort community would initially draw upon local and area residents. As the reputation of the resort is established, the market will include Southern Ontario, Michigan, Ohio and Illinois. Clientele at diversified resorts would be targeted for leasing or owning lots. Major markets would be families and young couples.	The costs of developing a resort community are dependent entirely upon the scale of the development and the component facilities and services. An estimation of the capital costs of components that might comprise the resort community has been presented in the discussion of diversified resorts (refer to Tables V-11, V-12, V-13 and V-14).	There may be difficulty in acquiring control of a land mass of the size and specifications needed. The resident population in each of the sub-zones is capable of providing the required staff for the proposed developments. The one possible exception is the Batchawana Bay developments, drawing staff from Sault Ste. Marie. Requires relatively extensive road development to provide adequate access and circulation within the community. Up front costs of servicing lots would entail major capital investment.

TABLE V-16
SUMMARY OF DEVELOPMENT OPPORTUNITIES
APPROPRIATE IN MORE THAN ONE
LOCATION IN THE SAULT STE. MARIE-WAWA ZONE

Private Sector

- Scheduled Air Tours
 - Short Duration
 - Half Day
 - Two Day Tour
- Scheduled Boat Cruises
 - Full Day
 - Two or More Days
 - Non-Passenger Vessels
- Overnight Rail Tours
- Safaris - Office and Staging Area
- Tours of Old Mines
- Raft Rides
 - Short Duration
 - White Waters Trip
- Commercial Fish Hatcheries and Trout Ponds
- Fish Bake
- Themed Amusement Area
- Self-contained Accommodation
- Diversified Resorts
 - Wilderness Gateway Resort
 - Water Oriented
 - Skiing Oriented
- Resort Community
- Outfitter
- Ethnic and Cultural Events
- Production and Sale of Local Crafts
- Second Residence Rental Agency
- Outward Bound Program
- Visual Arts Program

Public Sector

- Trails
 - Hiking/Cross Country Skiing
 - Horse
 - Trail Bike/Four Wheel Drive Vehicles
- Canoe Routes (detailed information
 - about routes, portages, locations
 - for camping and points of interest)
- Entrance Development
- Highway Signage

2. Sault Ste. Marie Sub-Zone

This sub-zone is the largest centre of population in the zone. Sault Ste. Marie serves as the major service centre and is the hub of the transportation and distribution in the area, and has the largest concentration of retail sales and services.

Sault Ste. Marie serves as the focal point for the zone. Ninety-four percent of all visitors to the area spend some time in Sault Ste. Marie, but usually less than three hours (1972 Visitor Survey). In addition to satisfying the normal curiosity urge to see new places, most visitors come to do some shopping, take the train ride, or to visit friends and relatives. The vast majority of visitors arrive by auto (over 90%). Of these, 61 percent arrive via the bridge from Michigan, 23 percent via Highway #17 East, 16 percent via Highway #17 North. More than half of the total number of visitors arrive during June, July, August and September.*

The function of Sault Ste. Marie must be to offer enough attractions so that visitors will find something of interest and thus stay in the area longer. As the zone's focal point, the responsibility of the City extends beyond its boundaries. Sault Ste. Marie must inform all visitors about the opportunities available throughout the zone.

For a large percentage of visitors to the zone, the city of Sault Ste. Marie is the first view they have of the zone. It is imperative that these visitors be given the right impression. The right impression must not only set the tone of what the city has to offer, but set the tone for the entire zone. Visitors entering the city via Highway #17 North and Highway #17 East must be made aware that they are entering a special sub-zone within the zone.

The first impression that visitors have entering the city must be improved. There are no distinct entrances to the city--visitors do not recognize that they are entering a special city, and once they arrive downtown, there is nothing to differentiate the centre from any other community in this part of the country. Landscaping and signing should tell the traveller something about the special characteristics of the city. The relocation of both the scrap metal yard at the east end of Queen Street and the gravel operation adjacent to City Hall are critical to beautify the downtown area and present a better image to visitors.

*Auto travellers only and does not include travel by residents within the zone.

To make the Sault Ste. Marie sub-zone a special place, a development theme should be adopted. The theme should communicate the fact that the city is a portal to the wilderness area and that it is, in essence, the wilderness resource centre. The historical importance of water and rail transportation, timber production, mining and steel production and fur trading can all take expression in the physical appearance of neighbourhoods and the city as a whole. An option of one or more of these themes would assist visitors in relating the existing industrial development back to the historical development of the wilderness.

Adoption of a development theme, or series of themes, for the downtown area would increase interest and, hence, shopping activity. The adoption of a theme to use in integrating the store fronts would catch the interest of visitors and inspire them to stop and shop.

Older neighbourhoods in the community should be encouraged to retain and upgrade their ethnic themes, e.g., the Italian section in Steelton.

The linear configuration of downtown Sault Ste. Marie, combined with the absence of dominant structures, tends to disperse visitors across a wide area. There is no single place that can be identified as the focal point for tourist (and resident) activities. The focal point should serve as an attraction in itself, and should also be a major distributor of information about other tourist opportunities. To overcome this problem, the Northern Centre, described in Table V-17 is proposed. This centre would serve both visitors and residents alike and would provide a showplace for the community. The Northern Centre should be located in the waterfront area. Developed close to the Civic Centre, they could form the scale of attraction necessary to induce visitors in Sault Ste. Marie, Michigan to travel across the bridge to visit Ontario.

The development of the waterfront area is extremely important. The waterfront is an attraction in itself, as passing ships can be viewed and there is the normal amount of interesting commotion associated with a waterfront. There must be a mix of both activity centres and passive spaces located along the waterfront so that it does not become a sterile green strip.

Tourist information centres must be located at the focal point in downtown Sault Ste. Marie and at convenient locations along Highway #17. Ideally, highway travel information centres should be located just past the landscaped entrance area. The entrance area would create interest and the adjacent location of the travel information centre would serve to capitalize on the interest created.

As mentioned earlier, Sault Ste. Marie needs to diversify and offer more attractions so that visitors will find something of interest to keep them in the sub-zone longer. This need resulted in the identification of several tourism development opportunities.

The family market is a market identified to be targeted. The necessity for more family-oriented attractions led to the identification of a marine museum and aquarium (Table V-18), a voyageur/lumberjack/native Indian show (Table V-19) and a themed amusement area (Table V-9). These three possible development opportunities could all occur as part of the Northern Centre. The previously described scheduled boat cruises (Table V-2), scheduled air tours (Table V-1), and raft rides (Table V-6) would also appeal to the family market.

Special events are of great appeal to families. A number of ethnic-oriented events could be offered in the city, such as:

Italian Week

Italians comprise a substantial proportion of the Sault Ste. Marie population (25%). They could share their culture over several days in late spring or early summer (June-July). Italian cuisine, games (e.g., bocce, soccer), dances, and handicrafts can be presented. Ethnic halls and churches can be used. Italian performers can be invited to the city. Contests such as wine making, wine tasting and wine judging, a bocce tournament, bicycle race and games can be held. Invitations can be sent out to Italian communities, clubs and relatives elsewhere to visit Sault Ste. Marie

Finn Festival

A Finnish cultural group is found in this sub-zone. An event highlighting the food, dances, handicrafts and other activities of the Finnish culture could be offered. A major part of the celebration could centre around cross country skiing activities and a series of cross country ski races could be sponsored. With the increasing participation in the activity of cross country skiing, a great deal of interest would be generated in both participating in and viewing the races. This festival would possibly be 2-3 days in length and held on a weekend. This should be a winter event (January, February) and could possibly be linked to the Bon Soo Winter Carnival.

Cultural Caravan

The large number of different ethnic groups represented in Sault Ste. Marie can be highlighted in a week-long ethnic festival. It is possible to conduct a cultural caravan similar to that of Toronto or Winnipeg. Each ethnic group offers food, entertainment and handi-crafts at the respective halls, and participants are urged to visit the various halls through the issuance of a passport. The passport serves as admission to the hall and is stamped upon entry. Invitations could be extended to the other ethnic/cultural groups throughout northeastern Ontario and even into communities in the south. The Folk Arts Association of Sault Ste. Marie logically would be the vehicle to coordinate such a multi-cultural project. This festival would probably be most successful during the summer months (July, August), possibly linked to the long weekends in those months.

Attractions for adults are also needed. Possible developments for adults could be a harness race track (Table V-20) and the previously described overnight train tour (Table V-3) and safaris (Table V-4).

Recognizing that there is a great deal of pleasure boating activity on Lake Huron and on the southern shore of Lake Superior (Michigan side), the pleasure boating market should be targeted. The deficiency of full service marina facilities discourages touring boaters from travelling to Sault Ste. Marie. The full service, commercial marina presently under development by the City of Sault Ste. Marie, should alleviate this problem. The Pine Street marina is being operated for the City under a lease agreement. The marina should contain a boat launching ramp, pump-out facilities, fuel supplies, power and water supplies, boat sales and repairs, supplies, boat rentals, wash-room facilities with showers, vehicle parking, haul out facilities, boat storage, and docking/mooring facilities. There is a possibility that additional boat storage and repair facilities will eventually be located at a separate east end site in the city (east of Fournier Road). Additional details about the marina and site are available from the Supervisor of Property Management, City of Sault Ste. Marie.

A smaller marina to service non-resident touring boaters will be developed on the downtown waterfront by the City of Sault Ste. Marie. This marina could be an integral part of the Northern Centre.

Eventually, as the capacity of the Pine Street Marina is reached, another marina (minimum service) should be developed at a site above the locks.

Marina facilities at Sault Ste. Marie are critical to all boating activity in the zone. Upon development of the marina facilities in the city, pleasure boaters can then be encouraged to travel into Lake Superior and explore the eastern shoreline.

Under the 'accessible wilderness' image, it is likely that expectations to see animals and birds native to the area will be created. A series of Natural Animal Viewing Areas should be provided by the Ministry of Natural Resources. These designated areas should be managed so as to increase the probability of animals being present. Interpretive displays and binoculars should be provided, and information about the best times to view animals should be widely distributed.

In addition to offering new activity opportunities, the current assets of the sub-zone should be maximized. The importance and impact of the Stone House is lost because of its present setting. More space must be provided around the house so that it has more visual impact. More interpretation of the historical background of the area should be offered to Stone House visitors, possibly through an interpretation centre located nearby.

The Abitibi building located near the locks are unique. They were constructed from stone quarried from the Canadian lock site and are imposing structures. Every effort should be made to preserve them. The importance of the property, including the blockhouse dating back to the last century, dictates that some cleanup should be done around the properties in the short term. In the long term, the structures should be preserved as attractions in themselves.

To ensure that visitors take full advantage of the attractions and services in the zone, the need for a good system of travel information distribution and for packaging activities is critical. A tour packaging operation (Table V-21) could respond to this need. The operation should be located in the Sault Ste. Marie sub-zone because of its function as the focal point of the zone.

Figure V-9 presents locational guidelines for development opportunities in the Sault Ste. Marie sub-zone. A summary of the development opportunities is found in Table V-22.

TABLE V-17
NORTHERN CENTRE

OPPORTUNITY

A multiple attraction centre for visitors and residents.

- .This centre responds to the need for a physical focus for Sault Ste. Marie, a showplace where visitors and residents alike can find a series of interesting attractions. Therefore, the types of component attractions, the physical design and the location are extremely important.
- .The centre must operate year-round, and should offer something for everyone. Through the types of attractions presented, and through careful programming, repeat visits to the centre must be encouraged. In order to accomplish this, it must be both attractive and be programmed so as to rotate attractions several times during the year.
- .Because the appeal of the area is made up of a series of small attractions rather than one large, overwhelming attraction, the centre should serve as the major point for describing several staged series of attractions for visitors. The fact that attractions are clustered together in nodes throughout the zone should be apparent to the visitor. Examples of visiting several nodes in stages to permit pursuit of a special interest should be presented for visitors.
- .The centre should focus upon offering entertaining and educational opportunities for the entire family. It should be possible for the family to split up upon arriving at the centre--permitting each member to do those things that are of specific interest to that individual. The possibility of offering child supervision services (babysitting) to give the parents freedom should be investigated.
- .The Northern Centre is a natural solution to providing key visitor services while serving resident needs; because the interests of visitors overlap with the interests of residents, and because visitor traffic is concentrated during the summer and will not support extensive facilities by itself, the amalgamation of attractions/services for both visitors and residents is a logical response.
- .The Northern Centre must serve the entire area and not merely the City of Sault Ste. Marie. Cooperation among the area municipalities is essential if the tourism business is to be increased throughout the entire zone.

CHARACTERISTICS

The centre should contain the following components:

- 1) Arts/Crafts Exhibition (8,000 sq. ft.) - An active local committee is currently investigating possible locations for the erection of an art gallery. Inclusion in the Northern Centre is particularly appropriate as gallery attendance would benefit from the visitors viewing other attractions in the centre in addition

TABLE V-17 (continued)

CHARACTERISTICS (continued)

- to acting as an attraction in itself. Exhibits/presentations in the arts/crafts exhibition area, the industrial exhibition area and the multi-use space should be rotated at intervals to encourage repeat visitation to the centre.
- 2) Multi-use space (6,000 sq. ft.) - Could be used for experimental theatre productions, film productions and convention/meeting space. There would be seating for 400+.
 - 3) Commercial (2,500 sq. ft.) - For retail operations which are directly related to the functions of the centre (e.g., tour packager/travel agency, outfitter/sports shop, local arts and crafts sales, perhaps including facilities to permit visitors to watch the production of the crafts).
 - 4) Industrial exhibition (8,000 sq. ft.) - To permit local industries to interpret steps involved in production, as well as pointing out why the industry is located in the zone and what specific products are supplied. The orientation should be to encourage the viewer to visit other areas in the zone which are also important in the production process. Industries represented should include iron mining/steel production, timber production/wood products, transportation (Algoma Central Railway, St. Lawrence Seaway).

There should be a major change of exhibits at least twice a year. Other area industries might be included in this exhibition space. These include commercial fishing, hydro electric suppliers, agriculture (e.g., maple sugar production on St. Joseph Island, mixed farming north of Bruce Mines and Thessalon) and northern outfitting.

Exhibits should permit participation by the viewer. Rather than simply being a display area, the viewer should be involved (e.g., similar to Ontario Science Centre). Retailing of products made by local industries could also be included in this space, such as the pouring of small steel ingots, bookends made from sections of the steel rails, cheeseboards made from laminated wood.

- 5) Restaurant (4,000 sq. ft.) - Should feature dishes typical of the ethnic groups represented in the area. An outdoor terrace of approximately 1,200 sq. ft. would be shared with the tavern. Approximate capacity of 130 persons could be provided in this space.
- 6) Tavern (3,000 sq. ft.)
- 7) Travel information centre (2,000 sq. ft.) - Would replace the travel information centre currently located at the base of the International Bridge. This space could also contain the local offices of the Ministry of Industry and Tourism.

CHARACTERISTICS (continued)

- 8) Offices (1,200 sq. ft.) - For performing arts/cultural/special event groups (e.g., Algoma Fall Festival, Bon Soo Winter Carnival, etc.). Up to seven offices could be provided in this space.
 - 9) Viewing area (600 sq. ft.) - At the top of the structure to permit viewing of the locks and river activities.
 - 10) Amusement area (6,000+ sq. ft.) - Located outdoors and adjacent to the building, the amusement area should include rides and activities. Rides and activity areas should be themed to represent the historical and industrial evolution in the zone. For example, a miniature train ride through the amusement area and around the building could be themed after the Agawa Canyon tour. An adaptation of miniature golf could highlight natural and man-made attractions in the zone. The amusement area should have free admission, but rides and activities within the area should have a separate user fee attached. The amusement area should be designed to permit year-round usage. For example, it is possible to construct a slide which can be used in the summer and converted into a toboggan run in the winter. Activities such as constructing log cabins could take place on the site and serve to create additional interest. As one cabin is finished, it could be sold and moved to its new setting.
 - 11) A marina (800 sq. ft. of indoor space plus mooring capacity for 30 boats) - Would be used by transient boaters. Should offer boat rentals for a short trip on the St. Mary's River.
 - 12) Docking space for tour boats
 - 13) Loading space for scheduled tours via float planes.
 - 14) Norgoma vessel
- .Optional attractions at the centre could include: i) Aquarium (1,500 sq. ft.) - A separate entrance charge could be made. The aquarium could feature native fish species; ii) A small bandshell to permit outdoor performances using turfed berms for seating; iii) Museum.
- .The construction theme should be one of the tourism development themes utilized in the zone. An adaptation of the mining/steel production theme has been used in Figures IV-5 to IV-10, but the logging, fur trade themes could just as well have been used in construction theming. Materials used should be steel, stone and natural finish wood, materials which typify the architectural theme selected. Construction could be phased over several years to permit expansion and addition as demand warrants. Extensive landscaping should be done and should include features which are typical to the area (e.g., rock garden made of large rocks,

TABLE V-17 (continued)

CHARACTERISTICS (continued)

a water feature, possibly including a tailrace, specimens of local trees and shrubs, etc. Landscaping could include a rose garden, rock gardens, as well as floral display areas. A feature could be beds of native flowers.

.The centre could be operated under several types of ownership, e.g., non-profit corporation, private ownership with leases, public ownership. The appropriate type of operation should be determined in a feasibility study.

LOCATION

Within the area bounded by Queen Street, the library, the station mall and St. Mary's River.

The location of the centre should permit visitors to park their vehicle and walk from the centre to a series of other nearby attractions (e.g., Civic Centre, retail stores). It must be located in the city centre and be in a highly visible location. Ideally, it should be located on the waterfront, visible to both Sault Ste. Marie, Michigan and to the downtown area of Sault Ste. Marie, Ontario. It must have ample parking at the centre and nearby to permit both short term (i.e., less than 1/2 hour) and long term (i.e., day-long) parking.

ROUGH CAPITAL COST ESTIMATES

Interior floor space:

- Approximately 50,000 sq. ft. for the facilities described plus 20% (for hallways, washrooms, etc.) brings the total required floor space to 60,000 sq. ft.
- At a cost of \$50 per sq. ft., the expected cost of the structure is \$3,000,000.

Landscaping:

- Landscaping is expected to cost \$2 per sq. ft. or \$80,000 per acre.
- Landscaping for the entire site will cost in the neighbourhood of \$300,000.

The total cost of the centre (including the cost of the structure, landscaping and equipping the facility) would range between \$4,000,000 and \$5,500,000.

The portion of costs derived from public funding would be through existing funding programs, e.g., art gallery-federal and provincial grants, etc.

CONSTRAINTS

Assembling so many different groups into one structure, each with its own particular objectives, will be a planning and management challenge.

The type of administration and ownership for the structure must consider the requirements of the various government grant programs (e.g., art gallery capital cost and operating cost grants, etc.)

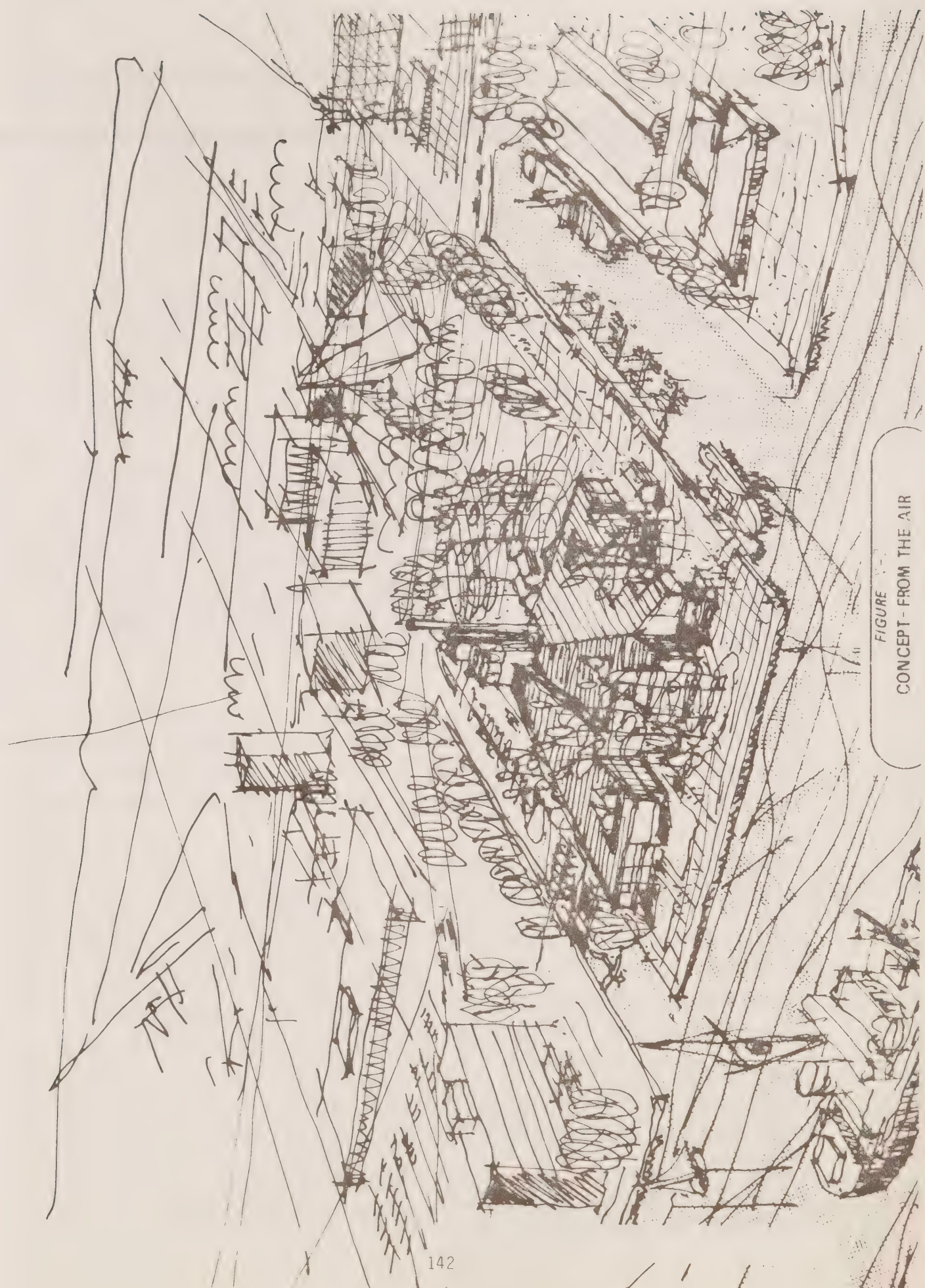


FIGURE
CONCEPT - FROM THE AIR

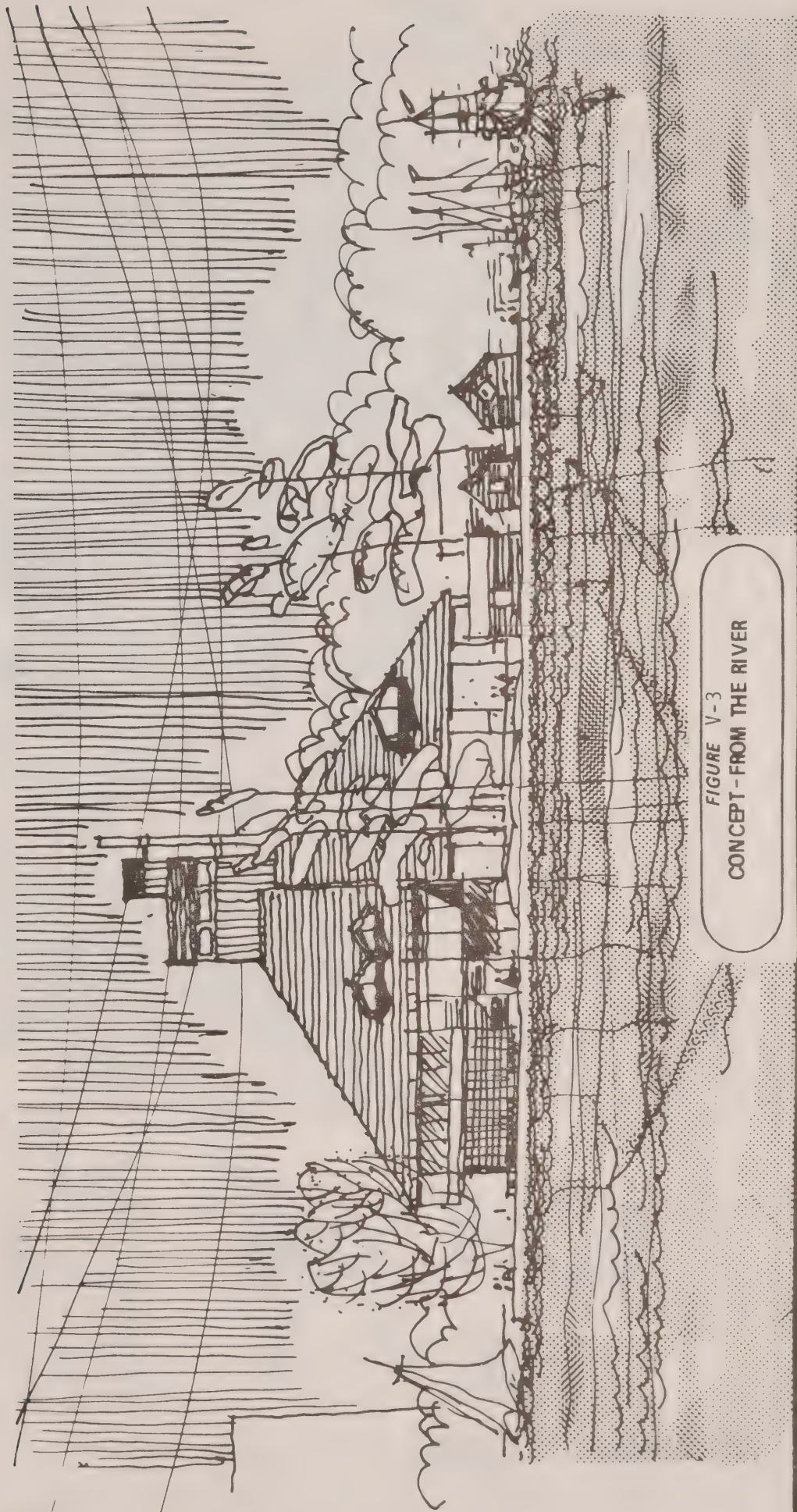


FIGURE V-3
CONCEPT - FROM THE RIVER

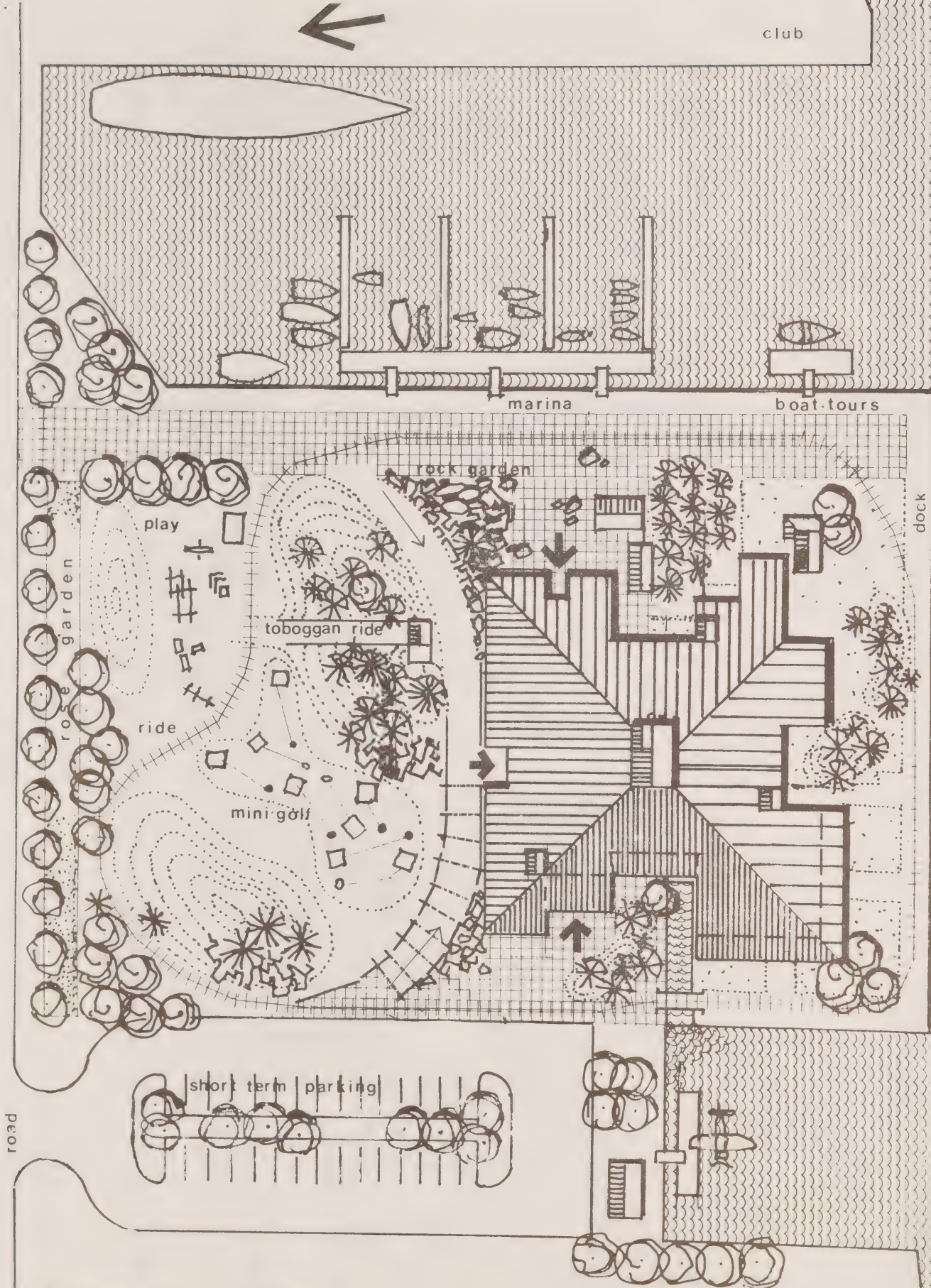
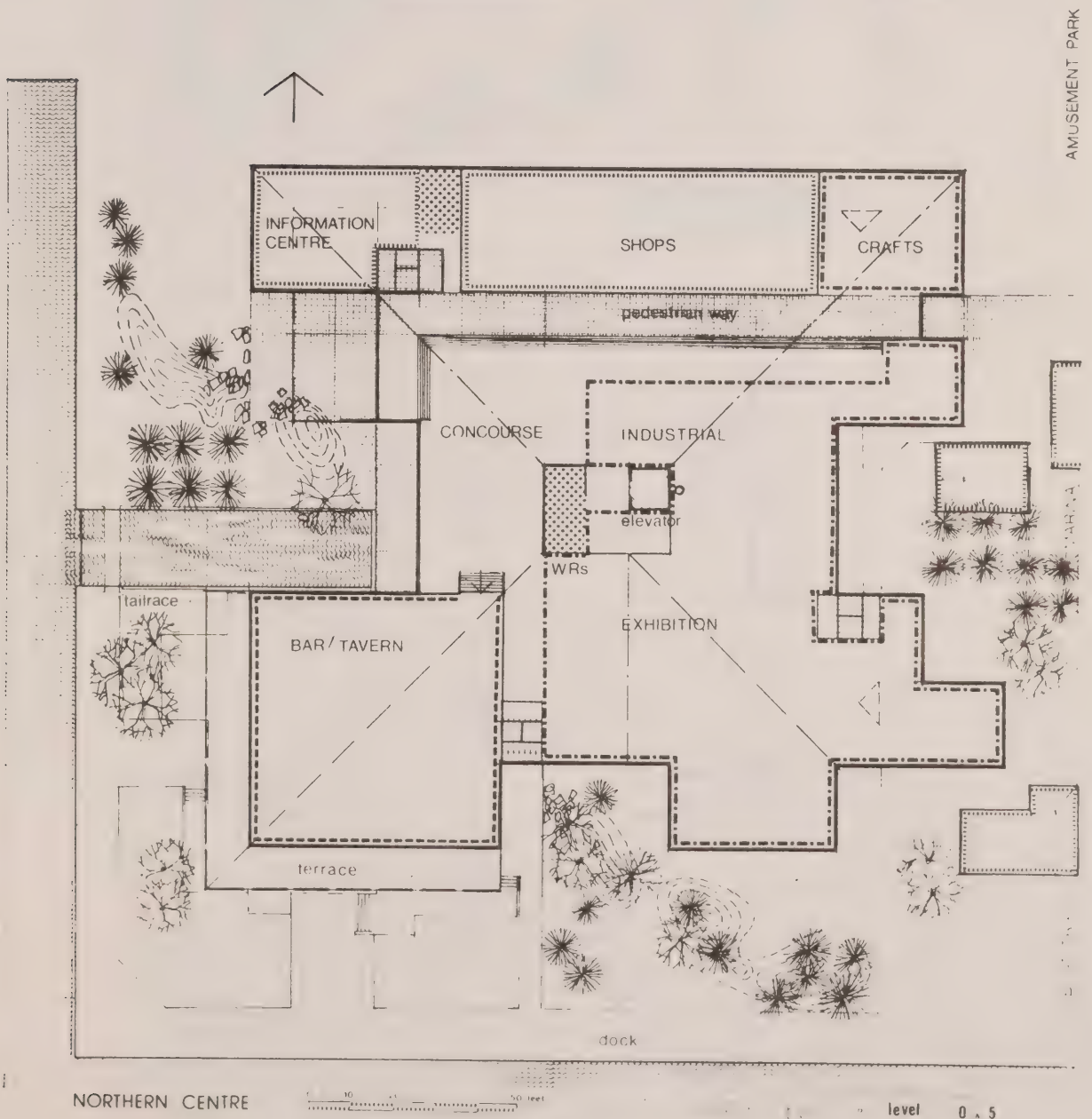
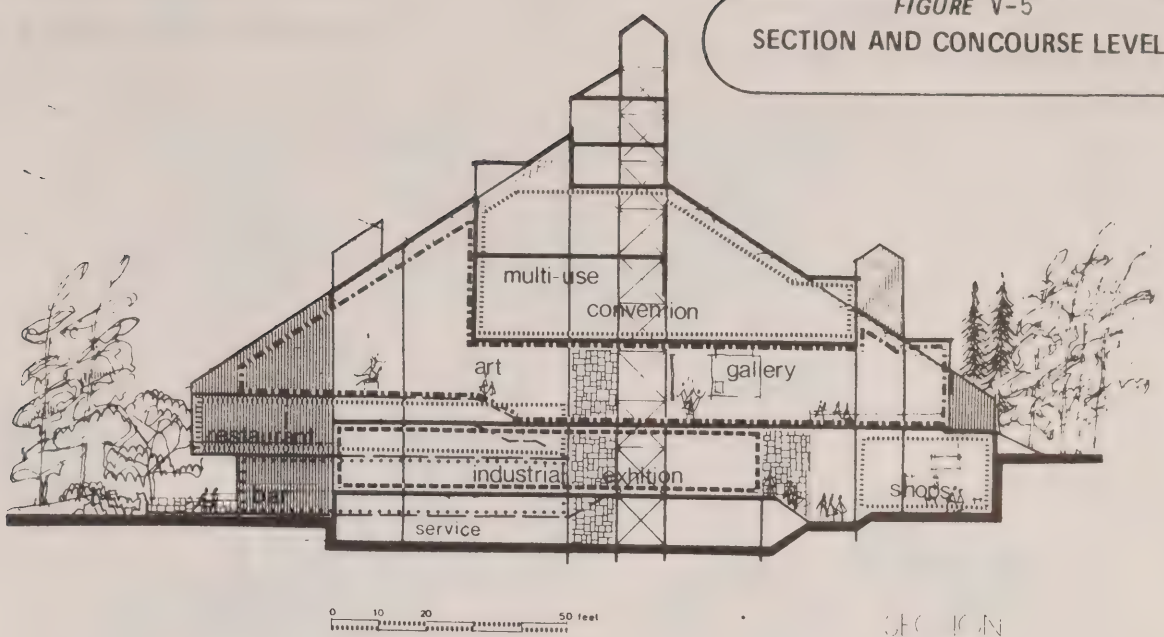


FIGURE
SITE PLAN

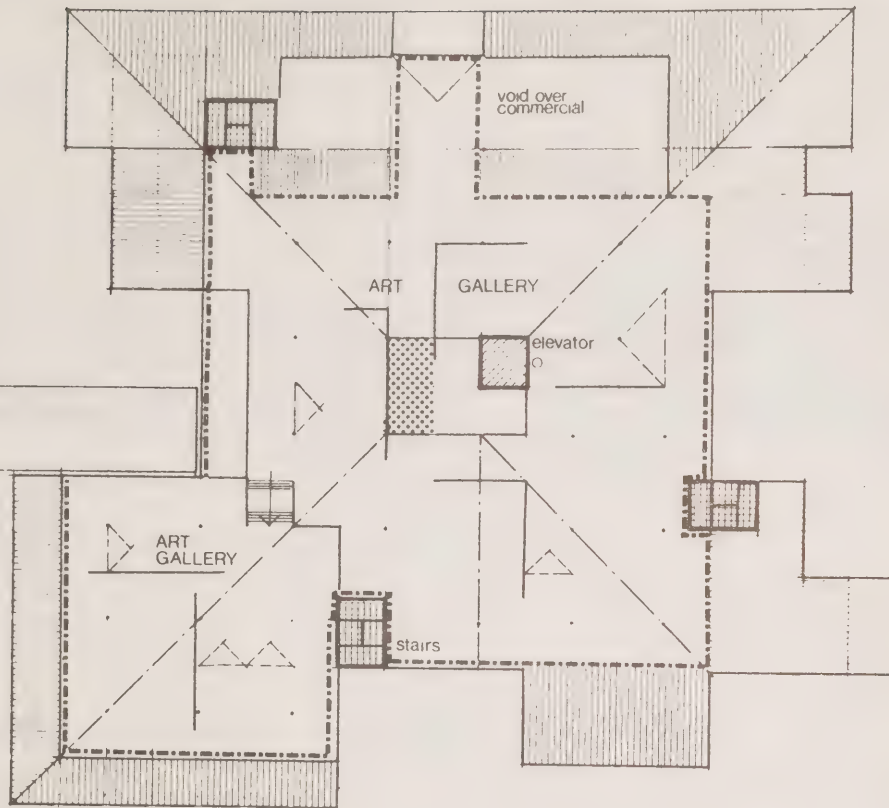
NORTHERN CENTRE

FIGURE V-5
SECTION AND CONCOURSE LEVEL



AMUSEMENT PARK

FIGURE V-6
ART GALLERY~ RESTAURANT & OFFICES



ART GALLERY • level +20 & 25

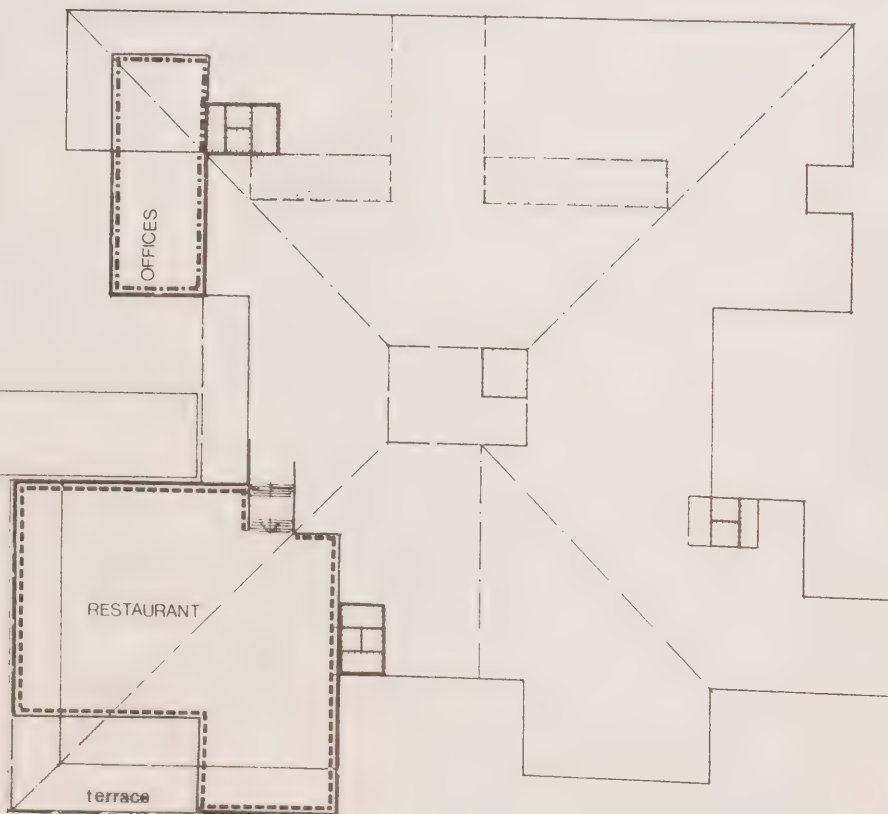
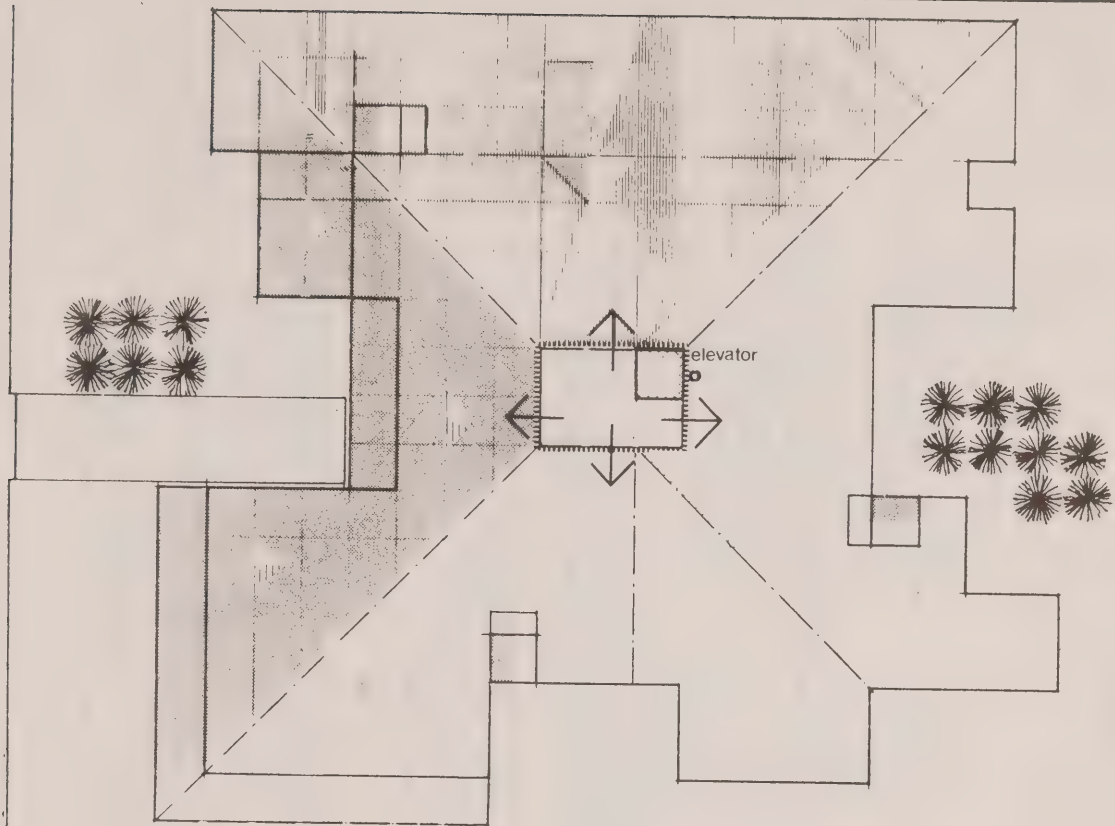


FIGURE V-7
LOOK OUT~MULTI-USE CONVENTION



LOOK-OUT • level - 70

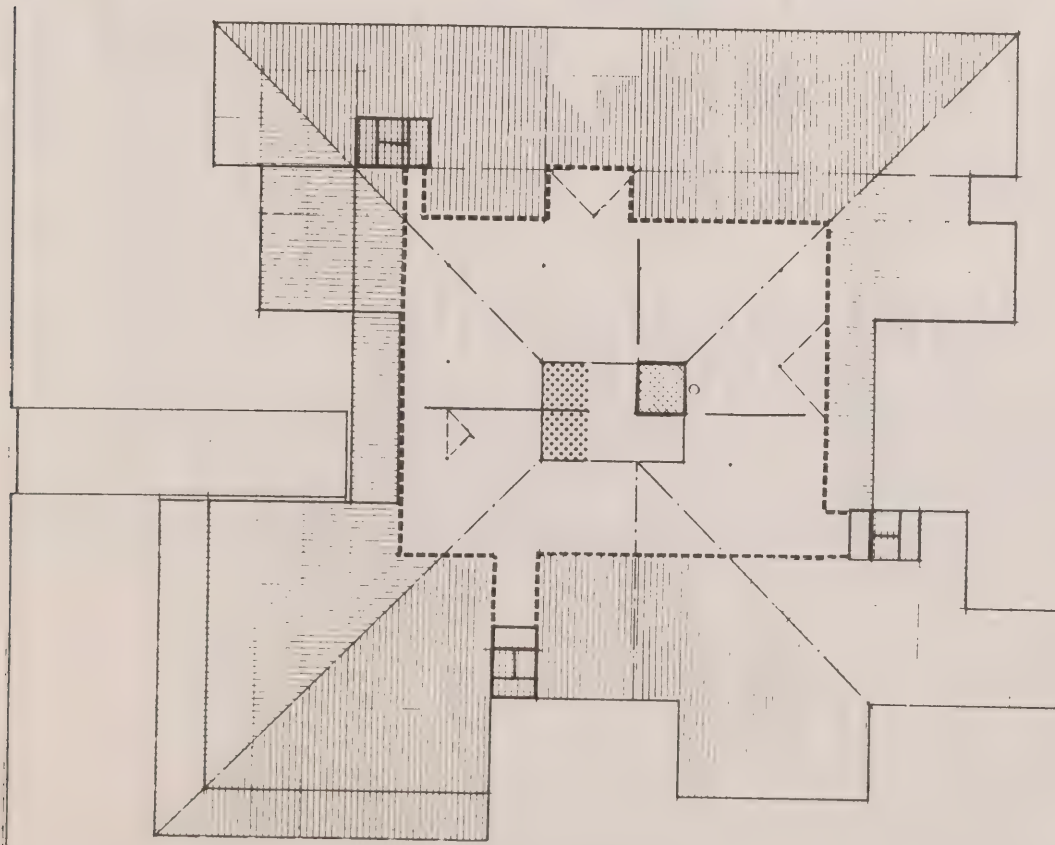


TABLE V-18

MARINE MUSEUM AND AQUARIUM

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Marine Museum	<p>This structure for the preservation of marine artifacts and descriptions of shipping and lock procedures should be located on or near the waterfront.</p> <p>The museum would capitalize on the renewed interest in the shipping industry (and shipping tragedies, e.g., Edmund Fitzgerald) associated with Lake Superior and the lock/ship channel system between Gros Cap and Lake Huron. Films that elaborate on the historical and present day aspects of the shipping industry and the channel system, or which show the Lake Superior and Lake Huron shoreline scenery could be presented at scheduled intervals. A film display could encourage visitors to spend more time in the area to explore the shorelines and to take one or more of the scheduled boat tours.</p> <p>Current discussion is taking place regarding the possible relocation of the marine museum located in Bellevue Park. That collection could form the core for an expanded museum.</p> <p>A minimum size for the museum would be 2,000 sq. ft., but it would be possible to be several times that size if additional artifacts and descriptive displays were provided.</p> <p>It is desirable to create some exhibits in which the visitor can manipulate to create a sense of involvement (similar to manipulative exhibits in the Ontario Science Centre).</p> <p>The museum could operate year-round if some programming of the facility took place (e.g., working with visiting school classes to present part of the curriculum in the museum setting. An exchange of marine and film exhibits with other marine museums would provide the variety to encourage repeat visitation.</p> <p>It could be located in either a new building or a renovated older building.</p>	<p>Should be located on the waterfront, as near to the locks as possible. The museum could, at this location, conceivably be incorporated into the city bus tours. Ideally, the museum could be housed in renovated Abitibi building(s). The buildings have a marine significance already as they were constructed from stone quarried from the lock site. Also, a miniature model of the first locks constructed at Sault Ste. Marie is already located in the grounds. At this location, the visitors taking the lock tours could easily be encouraged to make the museum a stopping point.</p>	<p>The market is all individuals visiting the Sault St. Marie region, especially families. A small entrance fee would be quite acceptable by patrons. Additional revenue could be derived through the retail sale of marine-associated souvenirs, books and charts.</p> <p>If the museum is large enough to be significant, upwards of 60,000 tourists per year would visit the facility during the first years of operation. Additional visitation can be encouraged through working with school boards and through the presentation of special programs at the museum site.</p>	<p>A new structure of 2,000 sq. ft. would cost approximately \$150,000, including parking areas. If an older building were renovated, the costs would vary depending upon the scope of the necessary renovations.</p> <p>Costs of acquiring and moving artifacts and preparing exhibits are dependent upon the scale of operation, but a minimum of \$15,000 should be earmarked for these purposes.</p>	

(continued)

TABLE V-18 (cont'd.)

MARINE MUSEUM AND AQUARIUM

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Aquarium	<p>An aquarium highlighting native fish species would create a significant interest. If the aquarium were associated with a marina museum or with the Northern Centre, it would have more visitors.</p> <p>The admission fee should be kept as low as possible, to encourage visits by families and repeat visits. Other means of supplementing revenue should be offered. For example, it may be possible to sell feed which could be administered under supervision and at certain times of the day. Sales of souvenirs can also be a significant source of revenue.</p> <p>Visitors to the aquarium should be acquainted with the fact that there are commercial fishing operations in the zone and where the operations are located. This could be done through the narration of a tour guide or by means of films or narrated slide shows that show the commercial fishing operations. Visitors could thus be encouraged to do more travelling in the zone and to purchase freshly caught fish (e.g., Maminse Harbour).</p>			Approximate cost for a 1,500 sq. ft. structure would be \$60,000. Aquarium tanks and equipment would be an additional \$25,000+.	Check with the Ministry of Natural Resources for current regulations.

TABLE V-19

VOYAGEUR/LUMBERJACK/NATIVE INDIAN SHOW

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
A scheduled exhibition of those skills which played a part in the settlement and development of the area.	Scheduled demonstrations of various skills and contests of interest to observers can be presented during the summer months. For example, Lumberjack skills and contests revolving around climbing poles, chopping and cutting logs, and log rolling in the water can create a lot of interest. Voyageur displays such as paddling, portaging heavy loads, and associated outdoor skills (e.g., fire building, musket firing) together with native Indian dancing, singing, etc., should be included. Opportunities could be provided for spectators to meet with the participants after the show and to try some of the activities themselves.	Sault Ste. Marie located as close to the city centre as possible	Consists of all visitors within a 150 mile radius of Sault Ste. Marie. Indeed, if the show was of high quality and presented an interesting variety of skills and competitions, it could become a major reason for visiting the zone. Families and tour groups would comprise the main market although anyone travelling through or near the zone would be potential clients. It is estimated that a show of this type would attract 25,000+ patrons during the first year of operation with a potential of 150,000 patrons within three years.	Covered seating for 600 patrons - \$200,000 Building for equipment storage, change rooms and washrooms - \$80,000 Building for retail sales of souvenirs and food - \$70,000 (Land and parking costs would have to be added to the above figures.)	-The show is strictly seasonal, July and August -Performers possessing the desired skills must be located and paid. Summer operation would permit the use of students as performers. It would be possible at intervals (weekends) to stage contests with the winners receiving trophies or cash prizes. This would lead to attracting competitors from across the continent and would greatly enhance the drawing power of the show.
	The site for the shows should be as close to downtown Sault Ste. Marie as possible. The site itself must be large enough to accommodate the required performance and seating area, including both land based and water based activities. Two performances could be scheduled per day--one in the afternoon and the other in the evening under lights to capture the train tour patrons and highway travellers passing through the area. Initially, the show might be presented on weekends. As popularity increases, it could be scheduled for weekdays as well. The setting for the show should also include displays of various artifacts and exhibits and retail sales of souvenirs. Snack foods should be available. Shows of this nature must remain authentic. 'Flashy' parts are required to create and maintain interest. An authentic presentation is more appreciated than a 'flashy' facsimile. A balance may have to be struck to maintain audience appeal and, therefore, revenue potential and authenticity. The setting for the show could be located adjacent to a permanent museum of artifacts related to the show's theme. Ample parking must be provided for a maximum crowd size.				

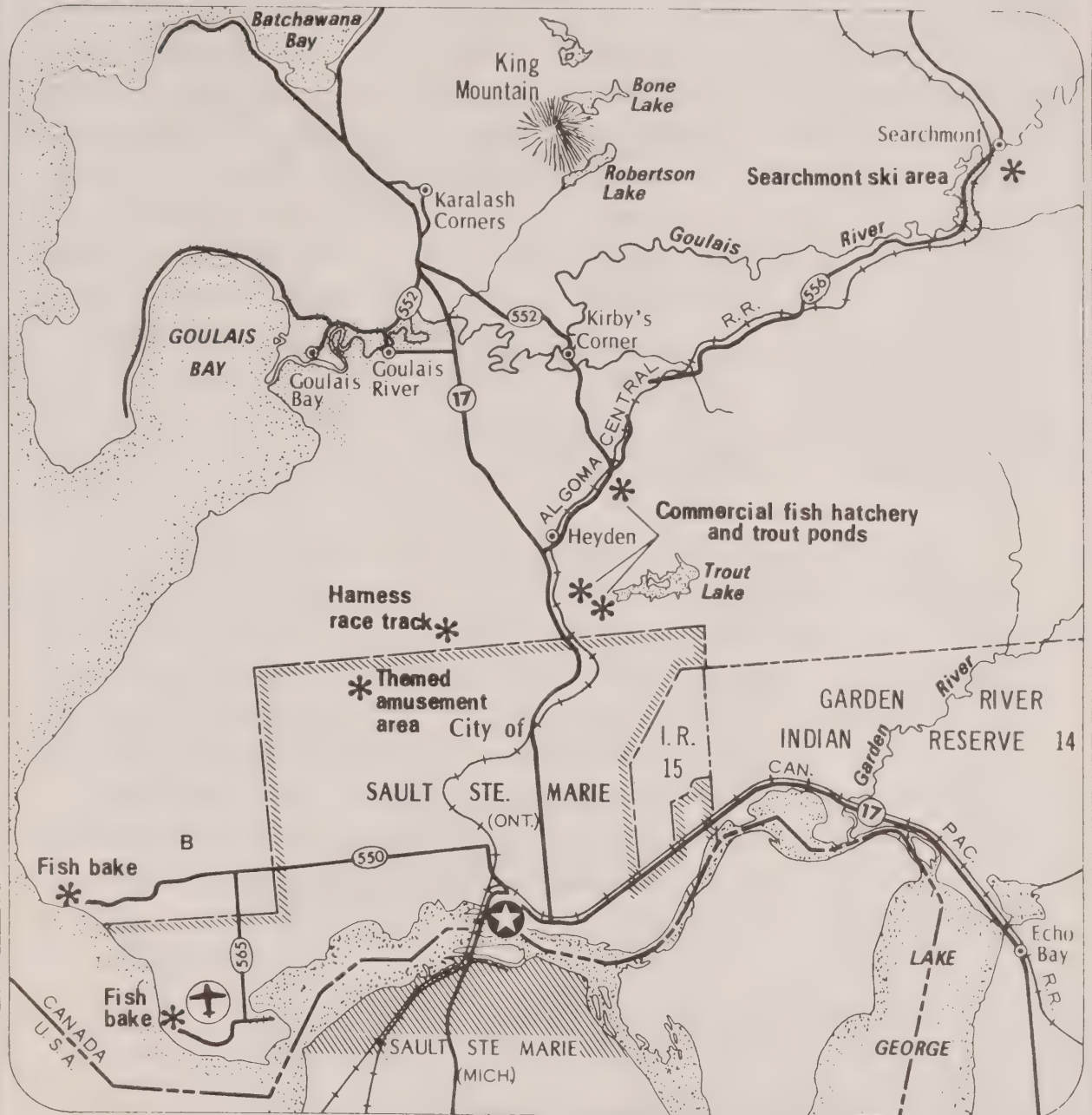
TABLE V-20
HARNES RACETRACK

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Harness Racetrack with Stables	<p>A harness racetrack operation of a scale similar to Sudbury Downs. It would contain:</p> <ul style="list-style-type: none"> -lighted track -grandstand including enclosed area for winter race dates -food services and lounge facilities -wagering area -stable and training areas -large parking area <p>The operating season is dependent upon the racing dates established by the Ontario Racing Commission, but it is possible to operate near year-round with three series of racing dates.</p> <p>At least 160 acres would be required for the operation, although a greater area is preferred.</p>	<p>Within a 15 mile radius of Sault Ste. Marie</p>	<p>Adults within a 60 mile radius of Sault Ste. Marie, Ontario.</p> <p>The market is primarily local residents, although tourists will swell the number of users during the summer months.</p> <p>A portable stage which could be moved in front of the grandstand would allow use for performances, e.g., music. Also, the dining and lounge areas could be used for meetings, celebrations, etc.</p>	<ul style="list-style-type: none"> -Grandstand with capacity 1500-2000 seated, 1500-2000 standing, enclosed area with air conditioning and heating, dining and lounge areas - approximate cost \$2.5 million. -Track surface - \$75,000 -Barns (4) each with 100 horse capacity - \$700,000 -Lighting - \$250,000 -Landscaping and parking areas - \$50,000 -Equipment - \$70,000 -Totalizer (wagering) equipment and electronic recording (e.g., video tape) equipment would be leased. -Land costs would vary depending upon location. <p>Total capital costs (excluding land) would range between \$2,800,000 and \$4,300,000</p>	<p>The supply of trotters in the Sault Ste. Marie area is limited and a program would have to be initiated to increase the supply.</p> <p>Capital costs and ongoing costs very high, thus, doubtful viability.</p>

TABLE V-21
TOUR PACKAGER

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Tour Packager	<p>Services involved are:</p> <p>i) development and operation of tour packages (process involves: assess resources in the area; identify themes for packages; select target market; determine product/ select tourism operations to be used; prepare promotional literature; and market package)</p> <p>ii) sale of tickets for attractions and events</p> <p>iii) provision of reservation services for accommodation, transportation carriers, etc.</p> <p>Revenue is generated from commission of sales and mark-ups on tour packages.</p> <p>Two market groups will be serviced:</p> <p>i) Prescheduled Tour Groups--Arrange and reserve accommodation, food services, transportation, attractions and any other services required by the selected target market; provide tour guide; and distribute brochures and literature on other attractions/activities available in the area;</p> <p>ii) Individual Packages (off the street customer sales)--provide accommodation and transportation reservation services, sell tickets for attractions/events; distribute promotional literature.</p>	<p>Sault Ste. Marie central downtown area (ideally located in the proposed Northern Centre complex)</p>	<p>Dependent on creativity and quality of tour packages developed. Currently, there are over 350 bus tour groups (carrying almost 17,000 passengers) coming to the area for the Algoma Central Railway Train Tour. Assuming high quality packages, estimate 175 packaged tours can be sold, serving a minimum of 7,500 individuals. A large 'off the street' market can be expected if operation is located in the proposed Northern Centre complex.</p>	<p>Minimal capital costs (dependent on whether or not floor space is leased or purchased). However, high up-front costs in developing and marketing packages before any sales will be made</p>	<p>Many operators in the area are not willing to pay commission. To implement, it will require a great deal of time to educate and sell 'packaging' concept to the operators.</p> <p>Government regulations putting more restrictions on tour wholesalers.</p>

FIGURE V-8
SAULT STE. MARIE SUB-AREA



Recommended Development Opportunities



- Rail tours
- Lumberjack, Voyageur, native Indian show
- Marine museum
- Aquarium
- Northern Centre
- Raft ride
- Whitefish Rapids

- Marina
- Tour packager
- Scheduled boat cruises (full day, two or more days, on non-passenger vessels)
- Scheduled air tours (short duration, half-day, two days)
- (Cultural events such as Italian Week, Finnfestival, Native Indian Show, Multi-cultural Caravan are held at various locations in the city of Sault Ste. Marie)



Individual Development Opportunity



Second Residence Area

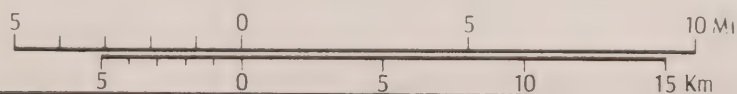


TABLE V-22
SUMMARY OF DEVELOPMENT OPPORTUNITIES
IN SAULT STE. MARIE SUB-ZONE

Private Sector

Scheduled Boat Cruises
 +Full Day
 +Two or More Days
 Non-Passenger Vessels
 Scheduled Air Tours
 Short Duration
 Half Day
 Two Day Tour
 Marine Museum/Aquarium
 +Themed Amusement Area
 +Safaris - Office and Staging Area
 Tour Packager
 Harness Racetrack with Stables
 Raft Rides
 Short Duration
 White Waters Trip
 Marinas
 Full Service (Pine Street)
 Downtown (For Touring Boaters)
 Minimum Service (Above the Locks)
 Lumberjack/Voyageur/Native Indian Show
 Special Events
 Italian Week
 Finn Festival
 Cultural Caravan
 Overnight Rail Tours
 Commercial Fish Hatchery and Trout Pond

Public Sector

Entrance Development
 Signage (assistance)
 Themed Amusement Area (assistance)
 Special Events (assistance)
 Italian Week
 Finn Festival
 Cultural Caravan
 Northern Centre

+ May also occur in other sub-zones

3. Wawa Sub-Zone

This sub-zone acts as a secondary service centre in supplying direct services to tourists in the northern part of the zone. It primarily services pass through traffic (e.g., accommodation, food, auto services) and acts as a 'jumping off' point to the interior rail and fly-in resorts/camps. Overnight visitors are distributed throughout the numerous motels. Nearby campgrounds in Lake Superior Provincial Park provide an additional supply of tourists to Wawa services and attractions.

Wawa acts as the northern entrance to the zone and, as such, is important as an information centre and entrance/exit point. Visitors entering the zone from Highway #17 north should be made to feel that they are entering a special area. Entrance development on the highway north of Wawa is necessary.

A development theme for the Wawa sub-zone should be adopted. An appropriate theme for Wawa is the portrayal of the mining and fur trading history. Some theming evolving around the railway development and its role in opening up the mining industry could also be done. The theming should also be rustic enough that the visitor recognizes that the sub-zone is a significant 'jumping-off' point for the interior wilderness.

Structures in Wawa should be themed to reinforce the mining history of the community and the vicinity. An architectural style similar to the 'modern mine shaft' style used in Colorado could be used. This style makes predominant use of wood as the construction material and is characterized by structures having several roof lines.

Hawk Junction should be themed to amplify the railroad heritage.

The significance of Michipicoten Harbour in Canadian fur trading history must be illustrated with development themes representing the fur trade era. The predominant construction material should be wood, unfinished (with or without bark). Log construction, or simulated log construction, should be used whenever possible. The fur trading development theme should be carried from Michipicoten Harbour out to Highway #17, so that travellers passing by the entrance road have advance warning that they are near a significant historical site (location of a Hudson Bay Post) and that there are recreational opportunities available. The theming could also be carried around the bay

to the Indian reserve, where additional attractions could be offered to reinforce the theme.

As most visitors to the Wawa sub-zone are pass through and short stay overnight travellers, attractions should be developed that can be enjoyed in one or two hours. Operation of these attractions should focus on the morning and evening hours so that the pass through travellers perceive that they can experience the attraction and still continue on their journey with little delay. The intent, of course, is to interest visitors in one attraction and use attendance at that attraction to lever them into visiting the other area attractions, and hence, to stay in the area longer.

The initial step should be to improve the existing assets in the sub-zone. Highway signs to Magpie High Falls, the gold mines and area beaches must be improved, so that those who are unfamiliar with the area can find these features with more ease. Improvement must be made to the access road and parking area at Magpie High Falls.

There is a need for more trails to link the settlements and features together. Bicycling and hiking trails should be established from Wawa to the Magpie High Falls, either along the Magpie River or adjacent to the existing roadway. Additional trails could create the opportunity for bicycle rentals. Interpretation of the area's attractions can also be upgraded. This is especially important at the site of the Wawa Goose. Interpretation should be attractive and eye-catching, e.g., displays, miniature models of gold mines, etc.

In the public sector, restoration of the Hudson's Bay Post at Michipicoten River would serve as a focus for the rich fur trading history of the area.

The beach on Wawa Lake could be further developed as an attraction. The addition of a fishing dock or pedal boat rentals would add increased interest to the waterfront. In addition to the tours of the old gold mines south of Wawa Lake, the possibility of offering tours through the Helen Mine should be investigated.

The above-mentioned attractions will serve to keep visitors already in the area longer. This sub-zone also needs additional attractions that will

specifically bring visitors to the area.

Appropriate destination attractions for this sub-zone include the previously recommended scheduled boat cruises (Table V-2), scheduled air tours (Table V-1), raft rides (Table V-6), safaris (Table V-4) and tours of old mines (Table). Sports fishing charters (Table V-23) could take advantage of the improving lake trout supply in Lake Superior. Marina services in the area should be expanded (see Table V-24). In addition to providing the services usually available at marinas, it could also act as the base for boat tours and sports fishing charters.

The interesting mining history of the Wawa sub-zone offers potential for a local festival, Mining Days. This festival would serve as a tourist attraction in addition to providing enjoyment to the local population. The festival could last two to three days and should include special picnics/ barbeques, performances, boat rides, and possibly a parade. There are a great number of mining artifacts and photographs in this area, many of which are located at Fort Friendship. A display of these items would contribute to the interest of the festival. The festival would be an excuse to dress up the community and would be an encouragement for pass through travellers to remain in the area longer. It would also attract nearby residents and travellers visiting other parts of the zone. It should be held sometime between late June and early September, preferably at a period when accommodation is available locally.

Figure V-9 presents locational guidelines for development opportunities in this sub-zone. A summary of the possible developments in the Wawa Sub-zone are presented in Table V-25..

TABLE V-23

SPORTS FISHING CHARTERS

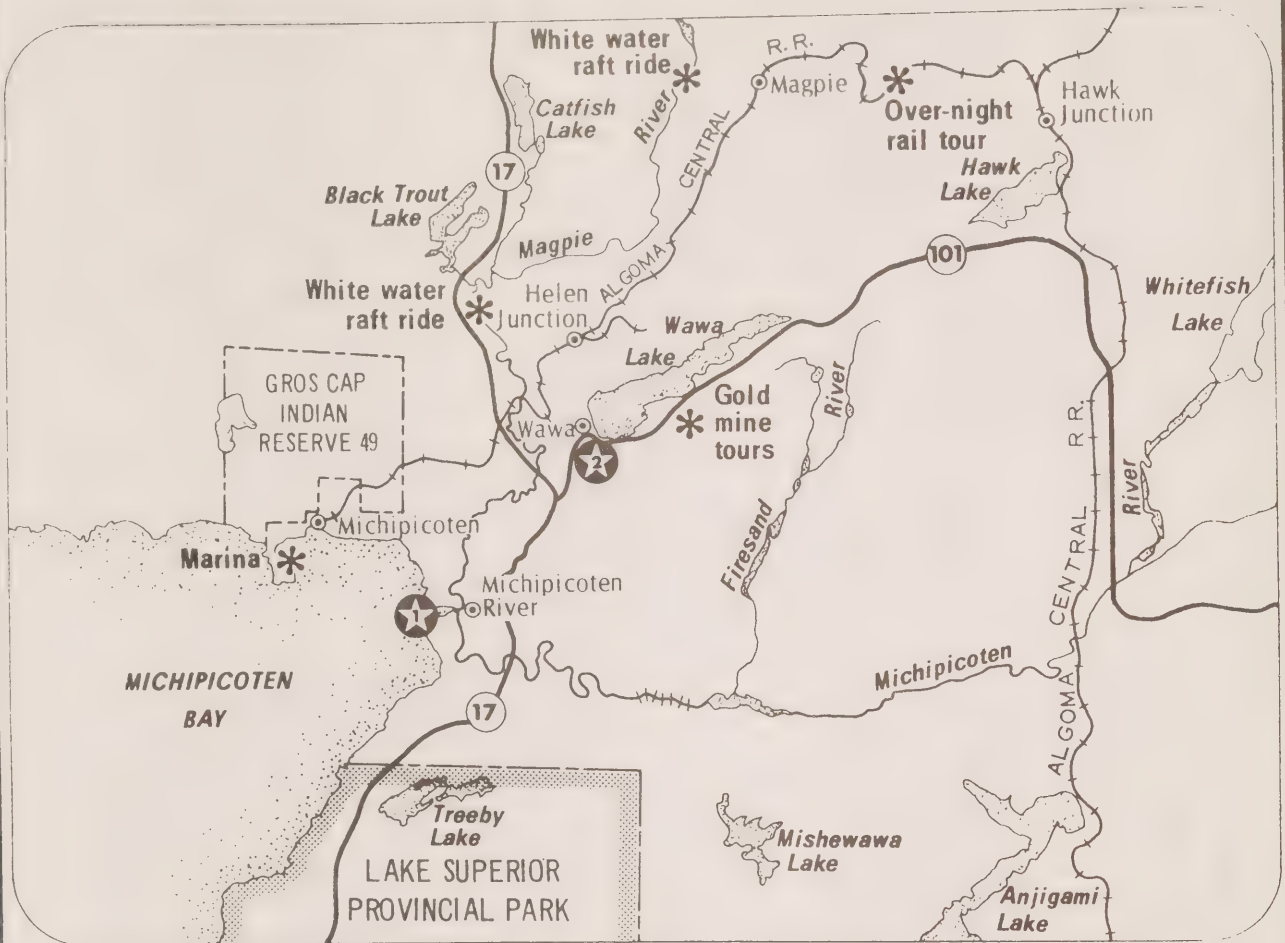
OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Sports Fishing Charters	Restoration of the lake trout fishery in Lake Superior will permit a commercial sports fishing operation near areas of Lake Superior with high fish populations.	Based in Wawa vicinity, with fishing in the direction of Michipicoten Island.	Primarily adult males, although a growing number of families are engaging in the activity. Participants would already be in the area and would learn of the operation through publicity. Overnight guests in Wawa and campers in the provincial park and resort/cottage users would be prime markets.	A new boat with capacity for 7 fishermen would cost in the range of \$40,000. This cost can be reduced through leasing other local boats with available time. Use of docking facilities at a local marina would eliminate the necessity to construct new docks.	Some testing of the fishing conditions should take place before the program is initiated.
Boat charters for lake trout fishing in Lake Superior	One or more boats can be scheduled for full-day fishing excursions. The number of fishermen to be accommodated depends upon the size of the boat used, but at least 5 fishermen could be accommodated on a 25 ft. vessel. A new boat does not have to be purchased specifically for this purpose--suitable vessels (e.g., yachts) could be leased from local owners. The fishing trip also could include travel by some scenic shoreline or a shore lunch at an interesting site, so that patrons will have a memorable experience even if no fish are caught. The charter fishing season can extend from May through October, although the period of greatest demand will be May, June, July and August.				

TABLE V-24

WAWA MARINA

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS																					
Marina 1. To provide mooring and boating services for visitors and area residents 2. To act as the base for boat tours, boat rentals and charter fishing	Must have an initial capacity of 20-30 boats and be capable of expanding capacity to 50 boats as demand warrants Services: -fuel, lubricants -water, electricity and sewage pump-out -supplies, laundry -repairs -boat launch ramp -boat rentals -dock for boat tours and charter fishing -boat storage (outdoors)	Located on Lake Superior, as close to Wawa as possible Two likely sites: 1. In mouth of River-near to Michipicoten Wawa; urban services readily available; needs more bottom deepening; small marina currently in operation 2. Oakes Cove-sheltered location farther from Wawa and relatively isolated	Increasing interest in boating on Lake Superior, combined with the opening of a new full service marina in Sault Ste. Marie to act as a 'jumping-off' point, will generate more boating traffic (cruises) up to the Wawa area. Transient boaters will come from Sault Ste. Marie, the Chicago area and from Detroit-Bay City. Boaters travelling to the area will be in search of a challenge (i.e., adults, in couples or groups). They will be professionals or retired, and will have the flexibility in arranging their vacations to permit scheduling the 2-3 weeks necessary for the tour. Local demand is primarily for fuel and services other than mooring, although demand for mooring and storage facilities will be created with the provision of a high quality facility. Transient boating traffic will be light for 3-4 years and then will increase to 300 boater nights in 6-7 years.	<table><tr><th></th><th>River Mouth</th><th>Oakes Cove</th></tr><tr><td>Dock</td><td>\$40,000</td><td>\$70,000</td></tr><tr><td>Building</td><td>35,000</td><td>55,000</td></tr><tr><td>Services</td><td>10,000</td><td>15,000</td></tr><tr><td>Road improvement and parking</td><td>10,000</td><td>60,000</td></tr><tr><td>Bottom deepening</td><td>40,000</td><td>40,000</td></tr><tr><td>Equipment (incl. rental boats)</td><td>5,000</td><td>5,000</td></tr></table> <p>Varying circumstances indicate a range of costs at the Michipicoten River location of \$100,000-\$180,000, and at the Oakes Cove location of \$170,000-\$320,000</p>		River Mouth	Oakes Cove	Dock	\$40,000	\$70,000	Building	35,000	55,000	Services	10,000	15,000	Road improvement and parking	10,000	60,000	Bottom deepening	40,000	40,000	Equipment (incl. rental boats)	5,000	5,000	<ul style="list-style-type: none">-Bottom deepening of sites is necessary-Tourist boating volume is largely dependent upon development of major Sault Ste. Marie marina-Road upgrading of approximately 15 miles is required for the Oakes Cove site-The boating season in the Wawa area is 2 months shorter than in Southern Ontario
	River Mouth	Oakes Cove																								
Dock	\$40,000	\$70,000																								
Building	35,000	55,000																								
Services	10,000	15,000																								
Road improvement and parking	10,000	60,000																								
Bottom deepening	40,000	40,000																								
Equipment (incl. rental boats)	5,000	5,000																								

FIGURE V-9
WAWA SUB-AREA



Recommended Development Opportunities

- | | |
|--|--|
| <ul style="list-style-type: none"> ★ • Hudson Bay fur trade post • Scheduled boat cruise (short duration, full day, two or more days) • Sports fishing charter • Marina • Fish bake | <ul style="list-style-type: none"> ★ • Mining Festival • Safari • Scheduled air tours (short duration) • Fish bake |
|--|--|

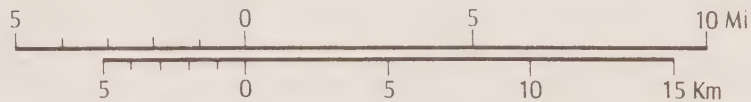


TABLE V-25
SUMMARY OF DEVELOPMENT OPPORTUNITIES
IN WAWA SUB-ZONE

Private Sector

- Marina
- +Scheduled Boat Cruises
 - +Short Duration
 - +Full Day
 - +Two or More Days
- +Scheduled Air Tours - Short Duration
- +Sports Fishing Charters
 - Raft Rides White Water Trip
- +Safaris - Office and Staging Area
- +Tours of Old Mines
 - Special Event - Mining Days

Public Sector

- Highway Signage (Magpie High Falls,
Gold Mines, Beach Area)
- Access Road (to Magpie High Falls)
(improvement)
- Hiking Trail (Wawa to Magpie High Falls)
- Hudon Bay Post - south of Michipicoten
(restoration)
- Special Event - Mining Days - at Wawa
(assistance)
- Tours of Old Mines (assistance for
access development to mines
and restoration)

+ May also occur in other sub-zones

4. Highway 17 North - Sub-Zone

The Highway 17 North area serves as a touring corridor containing the most spectacular shoreline scenery in the zone. The mix of natural, historic and man-made features, together with the varied topographic relief is unique to Ontario. Some of the highest elevations in the province are located here and the area has very high potential for extensive recreation (e.g., hiking, canoeing).

A number of second residences are in the area. A few resorts are located along the Lake Superior shoreline, and camping is available at Lake Superior and Pancake Bay Provincial Parks. A few small commercial campgrounds are also available. This sub-zone is a day-trip destination area for Sault Ste. Marie and Wawa residents.

Pass through traffic on Highway 17 will continue to increase, with travelers persisting in seeking most of their services in Sault Ste. Marie and Wawa, unless major development/redevelopment occurs between the two major centres. Current tourist activity is seasonal (summer-oriented), but there is the potential to expand to other seasons.

The vast majority of activity and development along Highway 17 occurs between the highway and the shoreline of Lake Superior. Some extensive development can be found along the Algoma Central Rail line. Many prime development sites already have some structures on them, but the quality is generally low. There is a need, therefore, in some of the older tourist operations for redevelopment to upgrade and diversify.

Development should be clustered in identified areas. Since the orientation of Lake Superior Provincial Park is towards preserving the environment, only extensive outdoor recreation opportunities are offered within the park (e.g., hiking trails, canoeing). The future outlook appears to be oriented towards increasing and improving the facilities required for extensive activities. With Lake Superior Provincial Park set aside for little or no development, a greater level of development can occur outside the park to respond to desires for more intensive recreation opportunities.*

The Batchawana Bay area has undeveloped land available and offers many advantages:

1. Water temperature is the highest along the Lake Superior shoreline, and Harmony and Havilland beaches present the best swimming opportunities in the entire eastern portion of the lake. Much of the bay has a sandy bottom and there are several beaches available.

*Development in the areas outside of provincial parks falls under the jurisdiction of the Sault North Planning Area.

2. The waters within the bay are protected and conditions for boating and sailing are good.
3. It has an interesting mix of terrain, and the ring of mountains surrounding the bay present a striking backdrop.
4. Islands seem to have an intrinsic appeal, making Batchawana Island an attraction in itself.

Most of the future tourism development will occur in this vicinity.

Development along the shoreline north of Batchawana Bay should be limited to the nodes of existing development (i.e., Mamainse Harbour, Montreal River Harbour). Mamainse Harbour should be expanded to highlight and enhance the commercial fishing operations headquartered there. Parking areas must be provided for visitors, and a better job of interpreting the commercial fishing activities should be done. The scale of the fishing operation should be made known through interpretive displays, and there is much opportunity to expand the retail sales of fresh and frozen fish and fish dinners. Publicity in up to 200 miles away could alert the pass through traveller to the fact that fish dinners were available at Mamainse Harbour.

Cottage development should be clustered in subdivisions and not merely scattered or strung out along the shoreline. A clear designation should be made of those cottage areas designed for seasonal, as opposed to year-round, usage and the year-round second residence areas should be located together so as to take the form of a 'destination' community with accompanying activity opportunities.

The lack of attractions provides development opportunities for raft rides (Table V-6), scheduled boat tours (Table V-2), fish bakes (Table V-8), tours of old mines (Table V-5), and overnight rail tours (Table V-3). The high topography, combined with winds off Lake Superior, make the area attractive for hang gliding and kite skiing in the winter.

Upon completion of marina facilities in Sault Ste. Marie, it is expected that there will be an increasing amount of boating traffic on Lake Superior. Touring boaters travelling north from Sault Ste. Marie and local boaters will require more marina facilities (see Table V-26).

Resorts, with potential for expansion into resort communities are prime development opportunities. The Algoma Central Railway Passenger Service is a valuable resource, especially as other opportunities for passenger rail travel decrease. The rail line provides potential for the location of resorts and

outfitters serviced by rail. A few resorts and residences are located along the rail line, but none are running at capacity. This is primarily a promotion problem, but upgrading, diversification and expansion must occur to appeal to more visitors. Packaging the rail trip with appropriate accommodation would be a synergistic mix.

More scenic vistas must be located along Highway 17. The scenery is spectacular, but there are too few vistas. Viewing the scenery while driving is unsafe and is reflected by a high number of annual auto accidents. Vistas can also be interpretive centres for the area, again acting to encourage visitors to stay in the area longer, taking advantage of attractions. The numerous attractions located along the highway must be better identified to the traveller. The lack of signs announcing the approach to attractions creates problems, as motorists are catching sight of the attractions in their rear-view mirror only. This signing problem leads to lack of concentration when driving and to accidents. Signs announcing a feature permit drivers to slow down and pull off the road in advance.

More public access to the Lake Superior shoreline is needed. The numerous pebble beaches would be a rockhound's paradise. Even though the water is too cold for swimming in most locations, the beautiful sand beaches could be used for picnicing and sunbathing. Off-highway parking would be required at these public access points, and signs identifying them should be posted.

Highway #17 is the only highway in this sub-zone. Seasonal access roads (lumber roads) and trails provide access into the area east of Highway #17. These roads and trails must be signed and the conditions under which they can be used must be made known (i.e., season of the year; for use by four-wheel drive vehicles only). The strategy for the Highway #17 Sub-zone is to maintain limited accessibility into the interior to preserve it for extensive recreational uses. New road development should be discouraged except in the Batchawana Bay Area where development has been recommended.

New development and existing facilities undergoing major renovation should be themed so as to be consistent with the overall development theme for the zone. Themes which can be used in the Highway #17 North area include fur trading, transportation--outlining the difficulty in building the A.C.R. Railway and Highway #17 (which was only completed in 1962), mining (in the area north of Batchawana Bay), and timber harvesting.

Figure V-10 outlines possible locations of development opportunities and Table V-26 summarizes the opportunities.

TABLE V-26

BATCHAWANA BAY MARINA

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Marina 1. To provide mooring and boating services for visitors and area residents 2. To act as the base for boat tours, boat rentals and charter fishing	Must have an initial capacity of 20-30 boats and be capable of expanding capacity to 90 boats as demand warrants Services: -fuel, lubricants -water, electricity and sewage pump-out -supplies, laundry -repairs -boat launch ramp -boat rentals -dock for boat tours -boat storage	On the Lake Superior shoreline in Batchawana Bay, in the vicinity of Batchawana Bay Provincial Park	With the additional marina facilities being located in Sault Ste. Marie, boating traffic in the North Channel will be encouraged to visit that city and to travel beyond it into Lake Superior. The combination of Whitefish Bay, Goulais Bay and Batchawana Bay creates a defined touring and sailing area, and there is current boating from both Ontario and Michigan. The increasing number of seasonal residences being located in the area will continue to increase local demand for marina services. Transient boaters will come from Sault Ste. Marie, the Chicago area and from Detroit-Bay City. Boaters travelling to the area will be in search of a challenge (i.e., adults, in couples or groups). They will be professionals or retired, and will have the flexibility in arranging their vacations to permit scheduling the time necessary for the tour. Transient boating traffic will be light for 1-2 years then will increase to 600 mooring nights in 5-6 years.	Docks \$70,000 Building 55,000 Parking and storage 5,000 Services 10,000 Equipment 15,000 Additional bottom deepening, road improvement and parking might be required, depending upon the specific site selected. Varying circumstances indicate a range of costs of \$110,000-\$200,000. For additional information about costs and services required, see North Shore Lake Superior Recreation Study, 1974, available from the Ministry of Natural Resources.	-Sheltered locations in Batchawana Bay usually contain sand bars (require dredging) -Tourist boating volume is largely dependent upon development of major Sault Ste. Marie marina -The boating season in the Batchawana Bay area is 2 months shorter than in Southern Ontario

FIGURE V-10
HIGHWAY 17 NORTH
SUB-AREA

- * Recommended Development Opportunities
- Second Residence Area

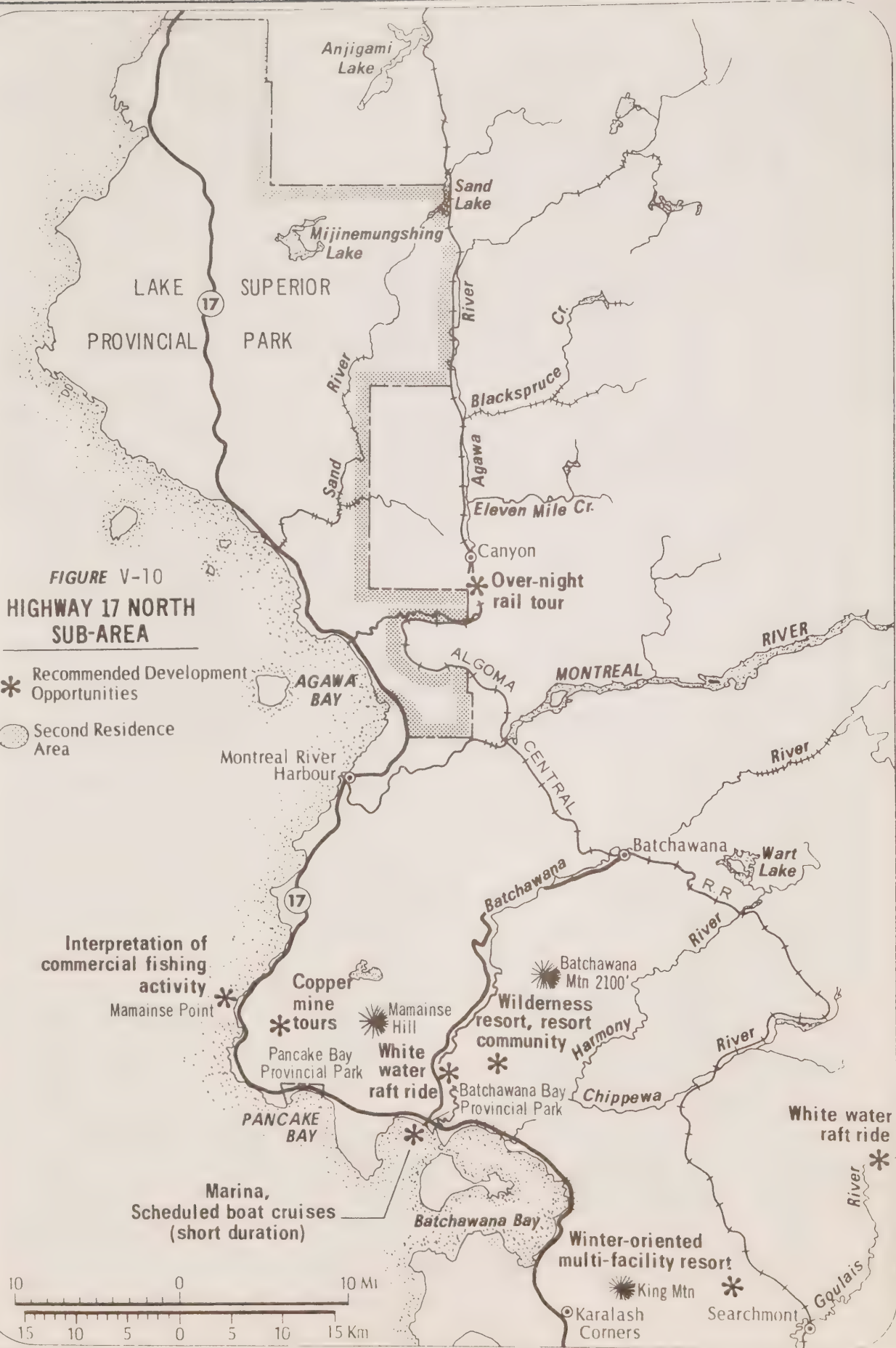


TABLE V-27
SUMMARY OF DEVELOPMENT OPPORTUNITIES
IN HIGHWAY 17 NORTH SUB-ZONE

Private Sector

Marina (Batchawana Bay)
Scheduled Boat Tours
+Short Duration
+Raft Rides - White Water Trip
Diversified Resort
Skiing
Superior Wilderness Gateway Resort
+Fish Bake
+Tours of Old Mines
+Overnight Rail Tours
+Commercial Fish Hatcheries and Trout Ponds
+Themed Amusement Area

Public Sector

Scenic Vistas (along Highway 17 North)
Public Beaches
Tours of Old Mines (assistance for
access development and
restoration)

+ May also occur in other sub-zones

5. Highway #17 East/St. Joseph Island Sub-Zone

This area contains a good highway network which facilitates year-round usage. Virtually all the land is patented (in private ownership) and the major land uses are farming and second residences. The lack of industry (besides tourism) has resulted in the area serving as a dormitory for Sault Ste. Marie. The population doubles in the summer as second residences are occupied.

The area primarily services pass through traffic and cottagers. It has potential for additional development of second residences and resorts and could be a day-use destination for Sault Ste. Marie residents and visitors. St. Joseph Island has appeal simply because it is an island, but it also has a military history dating back 150 years and a cottaging and farming history dating back 100 years.

Activity opportunities are natural resource oriented (e.g., boating, swimming, etc.), although the historical development is important (e.g., Fort St. Joseph, St. Joseph Island Museum, Bruce Mines Museum).

St. Joseph Island has an official plan, and one is in preparation for Echo Bay.

The Highway #17 East/St. Joseph Island area is the most quaint in the zone. Communities have numerous older buildings and simply need a 'spark' to initiate a major campaign of restoration and improvement. This is particularly important in view of the current improvement program for Highway #17. If Highway #17 no longer continues to run through the communities, the communities must offer a definite reason/motive for travellers to visit. Not only must additional attractions be developed in the communities, but the communities themselves must act as attractions. A substantial amount of beautification and improvement must occur before visitors will be convinced to remain and enjoy the amenities.

This sub-zone will remain a second residence and resort area in the future, with most activity occurring during the summer and shoulder seasons. Winter usage will be limited to cross country skiing and snowmobiling. The boating activity will increase, as will the demand for structured, organized recreation opportunities (e.g., golf, tennis). The quaint, pastoral setting of St. Joseph Island should be maintained because that is a large part of its attraction.

The lack of hustle-bustle and throngs of tourists is appealing. Whereas Mackinaw Island in Michigan seems to be 'bursting at the seams' at times with visitors, St. Joseph Island is a quiet, attractive setting for a relaxing visit.

A diversified resort-water activity oriented (Table V-13) is a major development opportunity. It could contain a marina to service the increasing volume of touring and local boating. Although a number of marinas are located in the area, not one has complete services (e.g., services to both transient boaters, local boaters, and those wishing to rent boats.) A marina could act as the base for houseboat rentals and for boat tours. The numerous islands southeast of St. Joseph Island provide a fine setting for the operation of houseboats. Houseboat Rentals should be associated with a marina located on St. Joseph channel. Initially, only two houseboats should be provided for rental and the number should be increased as demand warrants. It is possible to purchase an adequate houseboat for \$8,000, although larger houseboats will cost more than double that price. Weekly rental rates are in excess of \$200 plus gasoline and supplies. A 10 week operating season should be planned for late June through early September. The possibility of transporting the houseboats to ski areas in the winter for accommodation use should be considered.

Although the resorts will help to alleviate the deficiency of accommodations, a development opportunity remains for self-contained accommodation units (as described in Table V-10 , Section C-1).

Additional development opportunities resulting from the lack of attractions include a golf course (Table V-28), a Game Bird Hunting Preserve (Table V-29) and the previously described Scheduled Boat Tours (Table V-2), Tours of Old Mines (Table V-5), Themed Amusement Area (Table V-9), and Fish Bake (Table V-8). The mixed farm/ranch activity north of Bruce Mines/Thessalon provides an opportunity for a Guest Ranch (Table V-30).

At various points, freighters travelling up the St. Marys River pass within a stone's throw of St. Joseph Island. Facilities should be developed to permit the viewing of freighters while dining, picnicking, etc. More public access to the shoreline on St. Joseph Island must be provided.

The Voyageur Trail associated with the fur trading days passes through this sub-zone. The lumber and mining history of the area still is portrayed in many of the communities today. This sub-zone also contains some of the best farmland in northern Ontario. This mix of industries and how they developed a once wilderness area should be employed as the theme for the Highway #17 East/St. Joseph Island Sub-Zone.

Refer to Figure V-11 and Table V-31.

TABLE V-28

GOLF COURSE

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Golf Course and Driving Range	<p>A 9 hole golf course with clubhouse and associated driving range. Enough property must be acquired to permit expansion to an 18 hole course as demand warrants. A minimum of 70 acres must be available. The clubhouse should contain the pro shop for both retail sales and rental of equipment, a lounge area, food service area (may be either short service of full dining service).</p> <p>The operating season would be from May through September.</p> <p>The course could possibly be utilized for cross country skiing in the winter.</p> <p>More detailed information is available in the Golf Course Feasibility Study available from the regional tourism development office in Sault Ste. Marie.</p>	<p>In the area of Desbarats/Bruce Mines/Thessalon area-central to those centres as well as St. Joseph Island and the resort hinterland.</p>	<p>Made up of local residents and visitors from cottages and resorts staying within 40 miles of the golf course. Sault Ste. Marie residents could even be encouraged to play the course if it were well laid out and attractive.</p> <p>If the clubhouse were large enough to accommodate functions, it could serve the same market as hotel meeting rooms. An estimate of 6,000 golfer days could be expected during the first year of operation.</p>	<p>-Clubhouse -Equipment storage and workshop building -Fairway and greens development -Irrigation system (minimum)</p> <p>\$120,000 \$25,000 \$135,000 \$60,000</p>	<p>No one municipality or resort could financially support the development of a golf course.</p> <p>The support of several municipalities (Thessalon, Bruce Mines and possibly Desbarats) and the resorts in the area would be required.</p> <p>A committee should be established to coordinate the development and operation</p>

TABLE V-29

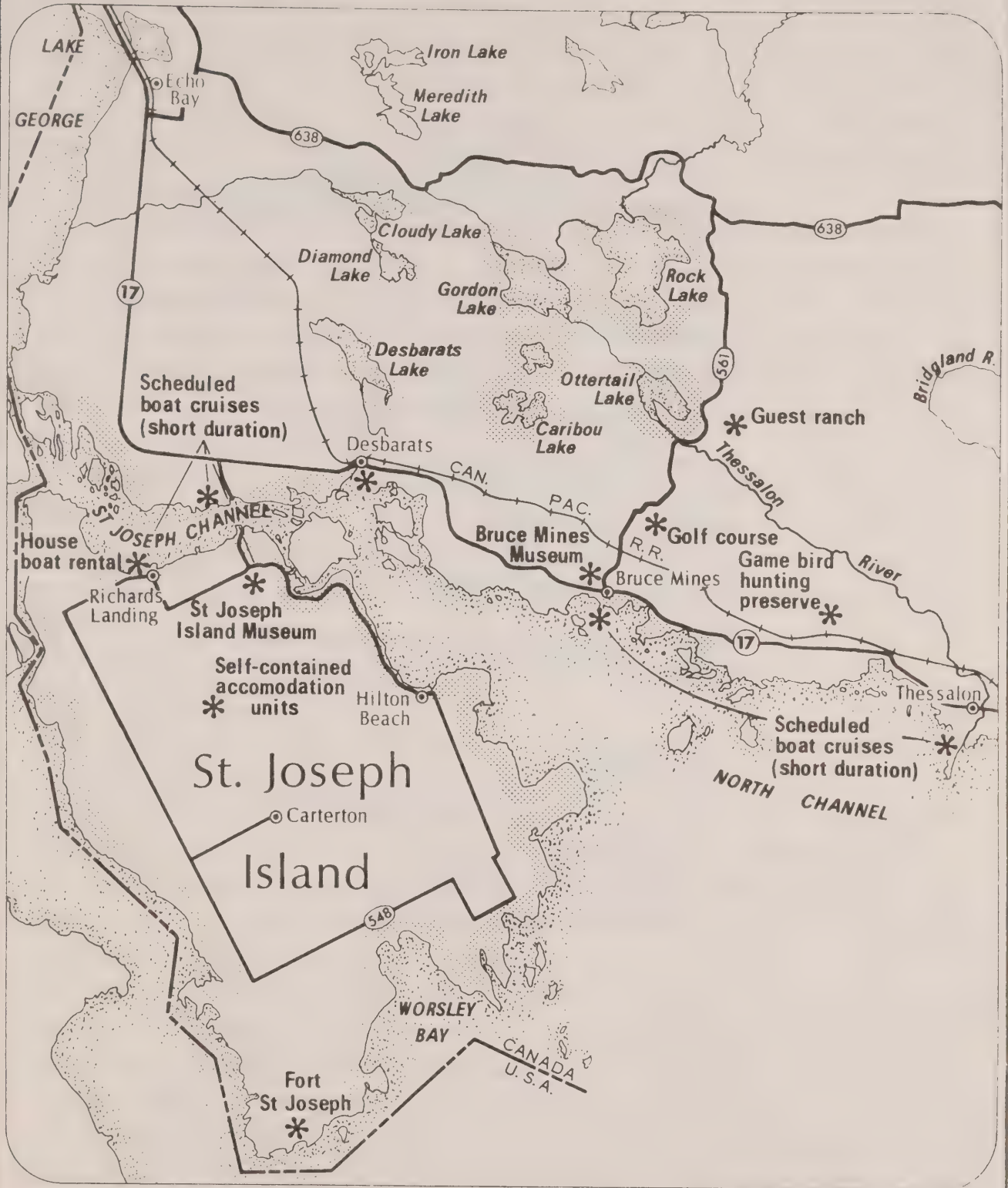
GAME BIRD HUNTING PRESERVE

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Game Bird Hunting Preserve	<p>A private/commercial area for hunting pheasant and bobwhite quail.</p> <p>If a propagation license is obtained, the game may be propagated and raised on the site.</p> <p>Otherwise, chicks can be purchased from other propagators in the province.</p> <p>According to regulations, the area shall be not less than 100 acres nor more than 600 acres in size.</p> <p>Hunting might take place from the 1st of September through to the 31st of March.</p>	The southern part of the zone, preferably in the area north of Bruce Mines/Thessalon.	<p>Local residents and visiting sportsmen. Big game hunters could be encouraged to participate in bird hunting either before or after the big game hunt.</p> <p>Business corporations are often prime clients of hunting preserves, to entertain clients.</p>	<p>Land cost is dependent upon the size of the operation.</p> <p>-Habitat improvement - \$5,000</p> <p>-Rearing and propagating facilities - \$20,000</p>	<p>Game bird hunting preserves are under stringent regulations, enforced by the Ministry of Natural Resources.</p> <p>Check with the local office for current regulations.</p> <p>Winter climate necessitates careful management to prevent loss of birds.</p>

TABLE V-30
GUEST RANCH

OPPORTUNITY	CHARACTERISTICS	LOCATION	MARKET	ROUGH CAPITAL COST ESTIMATES	CONSTRAINTS
Guest Ranch A ranch-like setting where guests may live and participate in associated activities	<p>The ranch would centre around the main activity of horseback riding. Instruction must be offered in the care and handling of horses. Good opportunities must also be provided to view and handle farm animals. The operation should replicate as closely as possible the operations of a normal working 'ranch'. Guests should be permitted to feed the animals, milk cows, and participate in farm production activities. A guest visit could culminate in a trail ride lasting one or more days and involving overnight stays in tents or outpost cabins.</p> <p>Other outdoor activities such as canoeing, backpacking and wildlife viewing must also be made available to guests.</p> <p>Meals should be provided 'family' style, around one or two large tables. Accommodation should be in separate rooms, simple yet comfortable.</p> <p>The guest operation should be one component of a diversified farm/ranch operation. In addition to the revenue derived from guests, revenue would be obtained from cattle, milk and egg sales and grain/hay production.</p> <p>A minimum size for the operation should be 160 acres.</p>	<p>In the area north of Bruce Mines/Thessalon where there are currently several mixed farming operations.</p> <p>Old logging roads could be used as horse trails.</p>	<p>Would include a broad range of ages. Children, adolescents, adults and families could all be accommodated.</p> <p>Guests would mainly come from Ontario and Michigan. School groups could also be targeted.</p>	<p>Additional accommodation and eating facilities for the guests (assuming a capacity of 20 visitors) would cost approximately \$55,000. Most rooms will be double occupancy and adjoining rooms will share a bath.</p> <p>Additional horses and equipment for guest would cost in the range of \$22,000.</p>	<p>The guest season would be 10 weeks in length.</p>

FIGURE V-11
HIGHWAY 17 EAST/ST JOSEPH ISLAND SUB-AREA



* Recommended Development Opportunities

Second Residence Area

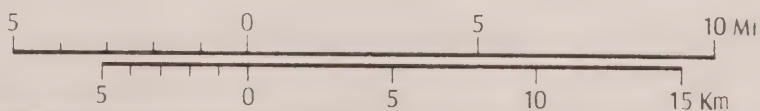


TABLE V-31
SUMMARY OF DEVELOPMENT OPPORTUNITIES
IN HIGHWAY 17 EAST/ST. JOSEPH ISLAND SUB-ZONE

Private Sector

Golf Course
Guest Ranch
+Diversified Resort - Water Activity
Oriented
Self-Contained Accommodation
Marina Expansion
Houseboat Rentals
Scheduled Boat Tours
+Short Duration
Game Bird Hunting Preserve
+Tours of Old Mines
+Commercial Fish Hatchery and Trout Ponds
+Themed Amusement Area
+Fish Bake

Public Sector

Historical Development (Fort St. Joseph,
St. Joseph Island Museum, Bruce
Mines Museum)
Golf Course (assistance)
Tours of Old Mines (assistance with
access development and restoration)

+ May also occur in other sub-zones

6. Interior Sub-Zone

The interior--an area of forests, rivers and waterfalls, the habitat for northern wildlife--a 'true' wilderness area disturbed only by timber operations which thin the forests. Its appeal is the lack of development. Only a few highways circle this interior wilderness. It is available for those who want to 'get away from it all' and get back to nature.

Developments which do exist are outpost camps, limited access resorts, primitive campgrounds in provincial parks and park reserves, and a few isolated second residences. Outfitter operations are also available. The interior area affords several extensive outdoor recreations; fishing, hunting (bear and moose), camping, canoeing and backpacking. The highway system which circles the interior area provides the touring auto traveller with a veracious picture of the untouched wilderness.

The desire is to maintain and preserve this wilderness area. Future activities would focus on doing a better job of what is already taking place. Further development of hiking trails and charting of canoe routes is required. More outpost camps are not required, although several existing camps must be upgraded.

The only service centre within the interior is the town of Chapleau. Other communities, such as Wawa and Thessalon, act as external service centres. This level of development is adequate for the packpacker or canoeist, but the traveller who wishes to experience the wilderness from his car requires more tourism services. If the Circle Auto Tour, involving Sault Ste. Marie, Wawa, Chapleau and Thessalon is to be promoted, signs and pull-off areas must be provided at points of interest. Existing food services and accommodations en route must be improved. There is also a need for self-contained accommodation units (refer to Table V-10, Section C-1).

The largest game preserve on the continent is located just north of Chapleau and could be promoted as an attraction. The 'height of land' separating the Hudson Bay and Lake Superior drainage basins is also located in the interior. Better interpretation of these two attractions should be done.

Chapleau has long been known as a terminal point for the Canadian Pacific Railway and is now also a lumbering industry centre. The development of these industries within the town has made it unattractive. Efforts to beautify and clean up Chapleau should be made. The industries, however, offer a potential theme for the town.

Figure V-12 outlines the Interior sub-zone. Refer to Table V-32 for development opportunities.

TABLE V-32
SUMMARY OF DEVELOPMENT OPPORTUNITIES
IN THE INTERIOR SUB-ZONE

Private Sector

Self-contained Accommodation
+Overnight Rail Tours

Public Sector

Trail Development

+ May also occur in other sub-zones

CHAPTER VI

IMPLEMENTATION

A. The Long Range Picture

The numerous new development possibilities outlined in Chapter V, if implemented, would represent major capital investment into the zone. This shopping list of opportunities has been presented to outline types of development which should occur in the zone, or which could or might occur under the right conditions. It is not the intent to suggest that all the possibilities should be implemented. Rather, it is the intent to help set long term targets.

The fluctuations in the economic climate, the uncertainties of the energy situation, shifts in government priorities and continuously changing travel patterns, collectively make it difficult to accurately predict the future. It is therefore necessary to re-evaluate tourism strategies and development needs on a continuous basis.

Recognizing these uncertainties, three scenarios of possible tourism development futures for the Sault Ste. Marie-Wawa zone are considered* should the principles and guidelines presented in the previous chapter be adopted.

Scenario 1: The Optimistic View

Assumptions

1. Inflationary cycle under control, i.e., no sharp or disproportionate escalation in building/construction and operating costs
2. Availability of capital for tourism sector persists or improves
3. Personal mobility remains high or increases

Taking the above assumptions into account, a great deal of new development would be expected in the Sault Ste. Marie-Wawa zone. Investors can seize on many of the opportunities which prove feasible. Development will be intensive in certain areas, but other development can be expected to occur throughout the zone. Figure VI-1 illustrates the intensity of tourism development expected throughout the zone under this scenario.

*Refer to Figure VI-1 and Table VI-1 for each scenario discussion.

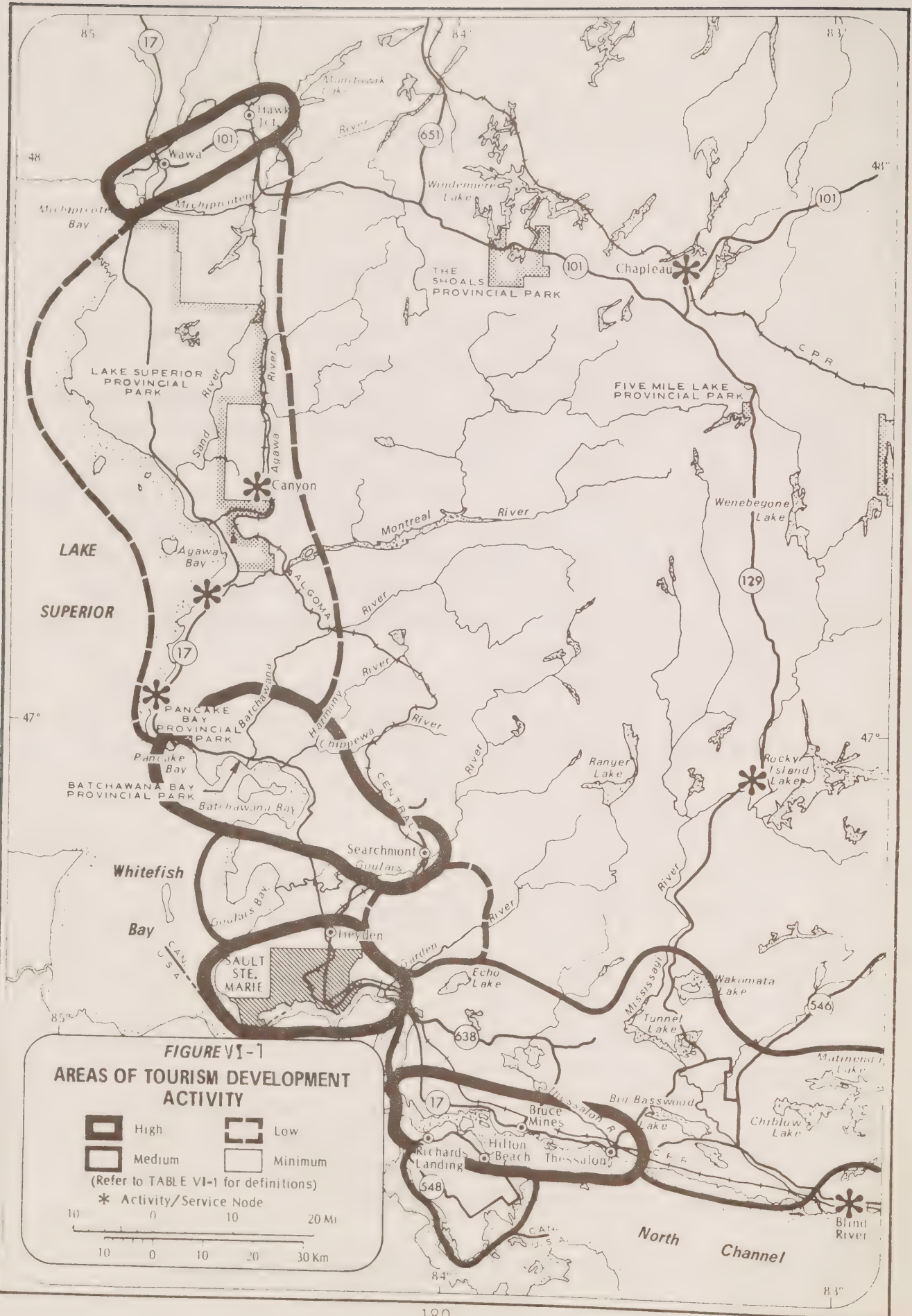


TABLE VI-1
LEGEND FOR FIGURE VI-1
AREAS OF TOURIST DEVELOPMENT ACTIVITY

SCALE OF DEVELOPMENT	CHARACTERISTICS	DEVELOPMENT	SEASON
HIGH	Contains a wide variety of attractions, accommodations and services	-Most everything-hotels, motels, golf courses, ski areas	Year-round
MEDIUM	Contains second residences (and primary residences), resorts and extensive activities development	Auto and grocery services, resorts/cabins, campgrounds marinas, trails	Year-round, but predominant summer usage
LOW	Oriented toward extensive outdoor activities.	Campgrounds, trails, canoe routes	Summer
MINIMUM		Outpost camps, trails	
ACTIVITY NODES	Contains services and attractions		

With this scenario, in the future, development will not be uniform across each of the areas identified, but will be clustered in those locations most suitable (e.g., dependent upon access, soil conditions, etc.). The 'high' level of development will occur first in Sault Ste. Marie, then Wawa and Bruce Mines/Thessalon and finally in the Batchawana area. Infilling of second residences will continue proportionate to other tourism development. In the 'low' and 'minimum' areas of development activities, set aside to maintain natural beauty and scenic touring appeal, activity/service nodes will occur.

The four areas of 'high' development will contain a wide variety of attractions, accommodations and other services. These areas will be the centres of year-round activity. Sault Ste. Marie, Wawa and Bruce Mines/Thessalon currently are the most developed sectors in the zone. Additional tourism developments in these areas will primarily be in the form of attractions to develop them further as destinations.

The Batchawana Bay area today is relatively undeveloped, but a great deal of development will occur here under this scenario. It will be a special area where many urban amenities will be provided in a non-urban setting. It will contain a mix of both intensive and extensive recreational opportunities. It will also serve as the base for day trips into other areas in the zone.

The 'medium' development areas will continue to be primarily for second residences. Developments compatible with second residences, such as resorts, campgrounds and extensive recreational activities, will occur here. Services provided will include gas stations, grocery stores and marinas. Although the areas will have the potential to be used year-round, the majority of usage will occur in the summer.

Little development will occur in the remainder of the zone. The 'low' areas of development will offer an accessible, relatively unserviced wilderness experience. Accommodation provided in these areas will be predominantly campgrounds and outpost camps or cabins.

The interior will continue to be a 'minimum' development area. Access to this area will be via canoes, hiking trails, lumber roads and small aircraft. This area will offer the 'pure' wilderness experience. Users will continue to require relatively high outdoor skill levels to explore the interior.

Activity/service nodes will be developed to service the 'low' and 'minimum' development areas. The nodes will contain accommodations, such as motels, self-contained cabins, and food/auto services. Some attractions will be located in the nodes.

Shifts in current market appeal will also be noticed if the suggested developments occur. There will be an increase in destination travellers. Although the pass through traffic will increase in actual numbers, this travel group will make up a smaller percentage of the total visitors.

Visitation to the zone will remain predominantly summer, but the winter months will take on a new importance. The distance factor from major markets will continue to limit the weekend traffic during the winter and 'shoulder' seasons. We will, however, notice an increase of extended weekend and vacation trips during these seasons.

The United States visitors will increase in real numbers, but will represent a smaller percentage of the total market. Southern Ontario residents will be a major market for the zone. The overseas visitors, particularly from Germany and Italy will increase as well.

The increase and mix of tourism/recreational opportunities will expand the appeal of the zone. More families will be coming to the zone. Several of the developments will appeal to the single, young adult market, and thus we can expect an increase in this market. The opportunities available in the zone will effectively respond to the current trend towards vacations, which respond to specialized interest groups. It is likely that bus tours coming to the zone will stay longer. New packages will be offered, increasing the actual number of group tours to the zone. Business/convention markets will increase both in an urban and non-urban setting.

Travel by air and bus will be used by a greater percentage of the market, although the private auto will continue as the major means of transportation to the zone.

Although the traditional motel will continue to play a role in the zone, more travellers will be using either the luxurious hotels/resorts or the self-contained cottage, campground or economy hotels.

The zone's appeal will be twofold. It will be a place where one can 'get

away from it all' and 'get back to nature', while also appealing to those wishing a controlled and guided wilderness experience. Primary activities will be extensive recreation-oriented--scenic touring (by all modes of transportation), hiking, boating, cross country skiing, etc. Urban-oriented activities will also be increased for those visitors (and residents) wishing merely to view the wilderness but to stay in the more familiar urban centre with its accompanying amenities.

Recognizing that this scenario has taken an optimistic stance, it is still most unlikely that all the suggested developments will be implemented, as the zone is unlikely able to support all the developments.

Scenario 2: A Moderate View

Assumptions

1. Current inflationary rates continue, but at slower rates, i.e., building/construction and operating costs within realms of investors with long term horizons
2. Capital availability for tourism sector scarce, but can be found
3. Personal mobility modified/fewer long distance trips, more economizing, i.e., energy situation worsens gradually and continuously; increased use of alternative modes of transport on longer trips.

New development can still be expected under the above conditions. Development will tend to be slow, proceeding cautiously. New development will thus not impact substantially on the zone's tourism industry in the short-term.. Existing operators will be confronted with the need to upgrade and diversify establishments or attractions. Upgrading and diversification will be the main focus for development.

New investors will likely take up those opportunities which give more immediate returns or which require smaller initial capital outlays. Investment in the zone will tend to concentrate on developed and well-serviced areas where the mix of natural and human resources is good.

Most new development will be in Sault Ste. Marie and Wawa. The numerous opportunities afforded by the Batchawana Bay area will likely encourage some new development here as well. The 'medium' development areas will continue to be mainly second residences, with continuing infilling activity. The 'low'

and 'minimum' development areas will be left undeveloped, continuing to be mostly day-use activity areas. Little development activity can be expected in the service nodes.

The types of development which will occur will be those which focus on rounding out the range of attractions (e.g., tours by rail, air, boat) and on responding to existing deficiencies (e.g., marinas). Some larger attraction developments will also occur, but will likely be those in which the public sector plays at least a partial development role.

The major market types will continue to be campers, VFR's and pleasure touring travellers. More bus tours can be expected. Average length of stay will increase with additional development under this scenario, but the ratio of destination to pass through travellers will not alter to any great extent. The summer will continue to be the predominant season, with moderately increasing 'shoulder seasons' usage. The actual number of visitors to the Sault Ste. Marie-Wawa zone will show moderate increases.

As a larger percentage of the travelling population will be economizing, there will be greater demand for self-contained accommodation, and the number of campers will increase. The 'big spenders' market will consequently comprise a smaller percentage of the market.

The major market group will be residents of Ontario, with a stabilization in the numbers of United States visitors. The overseas market will continue to be small.

Scenario 3: A Pessimistic View

Assumptions

1. Cost of money and operation costs escalate at higher rates
2. Restricted capital availability
3. Personal mobility restrained and travel patterns restricted, i.e., energy costs/inflation continues to rise at excessive rates.

If the above assumptions portray the actual conditions, it is unlikely that new tourism development will occur. The activity areas in the zone will continue to be the City of Sault Ste. Marie and Wawa. The communities of Bruce Mines and Thessalon will primarily cater to the transient/en route elsewhere markets. The remaining areas in the zone will continue to be primarily day-use activity areas and areas of second residences.

The lack of capital funding available will prohibit expansion and diversification of most existing operations. Existing operators will be forced to cooperate and 'package' to maintain market shares. The emphasis will be on 'theming', to attempt to create a unique and special travel area.

New development that does occur will depend highly on public funding. New developments will have heavy reliance on resident population to sustain them. Developments will be in the form of small scale attractions and services (i.e., trails, interpretive centres), which either the public sector has a major development role or the private sector receives public funding assistance.

The main market activities will be scenic touring, camping, having second residences, and visiting friends or relatives. The 'packages' offered will attract more of the special interest group market. Family visitation will decline moderately.

The origin of travel markets will be closer population centres (i.e., those in northern Ontario and upper Michigan), with markets from more distant origins tending to be special interest groups or individual adults. Distant markets will travel more by bus (in tours) or by other commercial transportation, with less use of the private auto.

The tourism industry will continue to rely heavily on the summer season. The 'shoulder' seasons will receive some visitation. Minimal winter visitation will occur. During the off seasons, the zone's urban tourism establishments will cater primarily to the transient business traveller and minimal convention business.

The average length of stay in the zone will continue to be short for those travellers not on packaged vacations or activities. Developed packages will extend the average length of stay of special interest groups and, to some extent, the bus tour markets.

The energy situation will dictate that more visitors will be destination travellers. However, numbers of visitors to the Sault Ste. Marie-Wawa zone will increase slowly under this scenario.

B. Stages in the Development Process

The scenarios describe three possible futures. Because of the uncertainties in projecting future conditions, flexibility must be built in when planning for tourism development. The scenarios imply direction as to what should be developed under different conditions. Viewed collectively, they also imply when development should occur. The implications of the three scenarios, combined with the uncer-

tainties confronting and which might or are likely to confront tourism development, demonstrate that development must be carefully timed and staged.

Stage 1

To ensure the existing industry can thrive under any conditions, Cooperation Among Tourism Operators must be increased. 'Packaging' of what currently exists is necessary. Current guests should be encouraged to visit other attractions so that they will stay longer in and return to the zone. Common 'themes' consistent with the 'accessible wilderness' image must be adopted to add to the appeal of the existing tourism plant. Cooperation with and by municipal governments must also occur in order to accomplish the necessary theming and community beautification.

Stage 2

These activities will help ensure larger markets and increased spending, leading to better economic conditions for operators. Another necessary development step is the Improvement of Existing Services/Attractions. Improving the existing tourism plant involves upgrading and diversifying operations to increase the zone's appeal and thereby encouraging longer and more visits.

Stage 3

As initial steps (cooperation, theming, packaging) are taken and the zone's tourism business climate improves, New Development will occur. These new developments will initially respond to deficiencies in the current plant and/or the developments frequently associated with present tourism activities. Once the initial new development, geared to filling gaps in the present plant, occurs, new larger scale investment can occur when economic conditions are favourable.

Current conditions in the Sault Ste. Marie-Wawa zone suggest that emphasis must be placed firstly on 'increasing cooperation' and 'improving the existing services/attractions'. This does not mean that new development should not take place, but a thorough feasibility analysis should be done for all potential new developments. Economic conditions and projected travel patterns must be closely monitored.

The following Table VI-2 has incorporated all the development opportunities presented in Chapter V. Many of the new developments can occur only if other developments precede them.

TABLE VI-2

*Stages may occur concurrently

TABLE VI-2 (continued)

	DEVELOPMENTS/OPPORTUNITIES	P A R T I C I P A N T S						
		Refer to Pages	Existing Operators	Regional Travel Associations	Municipal Government	Provincial Government	Federal Government	New Operators Investors
STAGE 3: ADDITIONAL NEW DEVELOPMENTS (Recommended for early consideration)	Scheduled Air Tours - Short Duration	114						X
	Half Day Tour	114						X
	Two Day Tour	114						X
	Scheduled Boat Cruises - Short Duration	115						X
	Full Day	116						X
	Two or More Days	116						X
	Non-Passenger Vessels	117	X					X
	Sports Fishing Charters	158						
	Raft Rides - Short Duration	92, 121						X
	Safaris	119	•					X
	Fish Bake (Event)	124	•	•				X
	Outfitter	109						X
	Marine Museum/Aquarium	135, 148			•	•	•	X
STAGE 4: OTHER DEVELOPMENT	Second Residence Rental Agency	113						X
	Self Contained Accommodation	126, 169						X
	Wilderness Gateway Resort	128						X
	Hudson Bay Post (at Michipicoten)	156				X	•	X
	Raft Rides - White Water Trip	110, 122						X
	Commercial Fish Hatchery and Trout Ponds	110, 123						
	Themed Amusement Area	111, 125						
	Diversified Water-Oriented Resort	112, 129						
	Diversified Skiing-Oriented Resort	112, 130						
	Resort Community	131, 151						
	Harness Racetrack	136						
	Marina - Batchawana Bay	165						
	Game Bird Hunting Preserve	171						
	Guest Ranch	172						

X - Direct Responsibility

• - Assistance (financial, promotion, management)

C. Roles of Various Participants in Implementing This Tourism Strategy

This section deals with the responsibilities each of the existing and potential participants should accept in working towards the goals suggested for the zone. The participants include:

- i) Existing and Potential Operators
- ii) The Regional Travel Association
- iii) Municipal Governments
- iv) Provincial Government Agencies

The tourism industry is primarily in the hands of the private sector with supporting facilities provided by the public sector. Therefore, no one sector or specific group has either the total responsibility or the authority to implement this strategy.

Roles appropriate for key groups are suggested in the following sections.

1. Existing or Potential Operators - What are Your Responsibilities?

The impact of this development strategy will be felt by you more than any other group of participants. Whether or not it is successful will influence the viability of your operation. Your responsibilities are:

- i) Cooperating with other operators. Collectively, responding to problems common to the entire zone. Promotion of an entire travel experience rather than one operation. Encouraging guests to visit other attractions so that they will stay in the area longer. Adopting a 'common' development theme to add interest to the zone's tourism plant. Cooperation must also occur with municipal governments to accomplish the necessary theming and community beautification.
- ii) Upgrading of existing operations. You cannot rely on new development to improve your business. It will be the combination of all operations and facilities that will create the image of the zone. Every operator should have a continuing upgrading program. Upgrading must include theming.
- iii) Diversifying existing operations and new developments. It is widely acknowledged that operations based on a single tourism activity are susceptible to shifts in market preference. A development that offers a diverse range of opportunities will encourage longer visits and more repeat visitation.

iv) Packaging - the development of packages for individuals and groups. Packages must be offered to respond to travel trends and to appeal to new markets. Also, they are an effective way to increase sales for single purpose tourism establishments.

v) and, to some extent Coordination - with other operators in order to make packaging work and to develop shared facilities, and with various levels of government in order that the maximum benefits to all can be obtained.

Great care was taken to identify problems confronting the existing operators. The solutions to these problems lie in your ability to follow the development principles and guidelines. Now it is your responsibility to implement and assist other participants in doing the same.

2. Algoma-Kinniwabi Travel Association - What Are Your Responsibilities?

The Travel Association is a source of detailed knowledge of the travel industry, markets and resources in the zone. This expertise should be drawn on to assist in implementing this zone development strategy; but care must be taken not to compromise the Association's current direct responsibilities in the area of promotion and publicity.

Consideration should be given to establishing a group drawn from the Travel Association to advise the Ministry on implementing the strategy suggested in this study. The Ministry, through its local tourism development consultant, should be able to draw individually and collectively on the expertise of this advisory group. The advisory group also should be requested and encouraged to influence local investors and operators, as well as attracting outside investors and potential operators to consider and develop investment proposals.

The Division of Tourism should consider the input from the suggested Travel Association advisory group, in allocating whatever funds it may have for medium- to large-scale feasibility and development studies, in order to select those which have not only a promise of being economically sound, but also are considered worthwhile and attractive by this Travel Association advisory group.

The composition of this advisory group should be flexible, and might be modified, depending on the specific locale or specific nature of the potential development. When appropriate, the group should also not feel restricted to

drawing only on members of the Travel Association executive, but might also seek outside counsel and advice. This group could work with local tourism development committees on theming, beautification and entrance development.

3. Municipal Governments - What Are Your Responsibilities?

The presence of the tourism industry in the zone has many benefits to the communities;

- i) generates revenue which is diffused throughout the community
- ii) provides employment opportunities within the municipality
- iii) creates new demands for goods and services that encourages the development of new local industries
- iv) the established infrastructure resulting from the tourism industry in itself can attract new economic activity
- v) and the recreation opportunities provided by the tourism industry have several benefits to the resident population.

Benefits from tourism don't 'just happen'. Indeed, social problems may arise if municipalities do not actively plan for tourism. A decision must be made in the development of the municipality. Once that decision is made, then planning is necessary to foster or control the growth of the industry. A policy decision must also be made which expresses the municipality's role as a provider of tourism opportunities.

If tourism is to become a sustaining element in the local economy, municipalities have the following responsibilities:

- .Tourism should be considered explicitly as an industry in the Official Plan. The policy statement made with regard to the tourism industry must be reflected in the allocation and planning of land, labour and financial resources.
- .Zoning should be utilized by municipalities to ensure a logical, attractive arrangement of land use conducive to the growth of tourism in accordance with the Official Plan (which should include tourism). A well-conceived, precisely written and enforceable zoning plan will provide the community with comprehensive land use guidelines that include tourism.

.Building restrictions should be strictly enforced to enhance the community's attractiveness.

.Local government has a responsibility to make some aesthetic improvements and general beautification. These improvements help encourage voluntary upgrading by businessmen and residents.

Areas of specific involvement by municipalities should include:

- i) entranceway developments
- ii) historic building and area preservation
- iii) screening and buffering of 'eyesores'
- iv) waterfronts made accessible and developed for public use
- v) assist merchants on main streets to upgrade and theme storefronts.

The smaller communities should cooperate in the provision of joint recreation/tourism facilities (e.g., golf courses) which may not be viable for one community alone.

4. Ontario Ministry of Industry and Tourism - What Are Your Responsibilities?

The Division of Tourism of the Ministry of Industry and Tourism has the responsibility of promoting and communicating the ideas within the report, coordinating the recommended activities of all the participants, and assisting new developers.

(a) Promotion/Communication

- i) a summary of this report should be prepared for public distribution
- ii) opportunities to address various business groups, including bankers and investors should be created
- iii) a special conference should be held with the zone's existing operators to discuss this report (possibly affiliated with the Algoma Kaniwabi Travel Association's annual conference)
- iv) Municipal officials should be contacted to discuss the report.

(b) Coordination

- i) many of the recommendations have direct implications on other government agencies' programs; the Division of Tourism must work closely with the appropriate Ministries to ensure they are fully acquainted with and accept the report. Ideally, the report should be used in setting the priorities of the regional/district offices of other Ministries

- ii) there are development suggestions in which the public sector has a development role; the Ministry of Industry and Tourism must work with the appropriate public agency in order to ensure that the development takes place.

(c) Assistance

- i) seek out potential investors capable of developing the larger attractions/services
- ii) aid investors in finding financial assistance
- iii) assist municipalities in defining their role in the development of tourism in the zone, and also how the implication of the report's recommendations can be incorporated into official plans
- iv) some consideration should be given to assisting in feasibility studies of the larger developments recommended.

Regional Tourism Development Consultants must work closely with the developers, advising them from the conceptual stage to the operational stage. The Regional Consultants should encourage existing operators to upgrade and diversify as recommended in this report.

5. Ontario Ministry of Natural Resources - What Are Your Responsibilities?

The Ministry of Natural Resources must ensure that the natural environment, in part through the Provincial Parks system, is managed in an ecologically-sensitive way, in order to maintain an environment conducive of the 'accessible wilderness' image. Development involving intensive use must be concentrated in selected areas (refer to Figure VI-1) and the non-urbanized areas should be managed as the basis for extensive recreational use. In order for both the resident and visitor to enjoy the wilderness, some degree of development is required--development which enhances extensive use but which also maintains and protects the environment.

The Ministry of Natural Resources must be concerned with:

- i) provision of linear systems for trails (e.g., hiking, cross country skiing, horseback riding, four-wheel drive vehicles) and water routes (e.g., canoe, raft). These systems must be identified, described for potential users, and maintained.
- ii) the numerous geological, vegetation and wildlife features/areas within the zone, e.g., natural animal viewing areas, Leeburn, Ripple Rock as Desbarats, Gros Cap, etc. These features/areas

should be given greater recognition as attractions. Development which enhances opportunities for viewing of these features should be undertaken.

- iii) more intensive fish and wildlife management programs.
- iv) increasing the number of official water access points.
- v) facilitating the viewing of resources and resource based industrial activities, e.g., logging. A variety of programs interpreting the activity being viewed will prove of interest to many visitors and further an understanding of natural resource management programs.

6. Northern Ontario Development Corporation - What Are Your Responsibilities?

This report should be used as a guide in the decision-making process of granting loans. It should also be used as a resource for NODC to assist applicants in the formulation of the development concepts.

D. Public Assistance Available to Aid in the Development of Tourism

Principles of public involvement can be considered in four major categories:

1. providing infrastructure (e.g., roads, airports, planning assistance for developments, and encouraging a rational approach to the development of communities and services;
2. assisting developments--through various incentive loan and grant programs (direct);
3. providing attractions--(e.g., Parks, Ontario Place) which complement private/commercial attractions and services, and which have, in some cases, provided direct competition;
4. assuming a stewardship role over the natural resources--to ensure that developments respect the environment and do not create environmental problems (e.g., pollution).

The government therefore assists and regulates or controls both new developments and existing operations.

Northern Ontario already receives preferential treatment in most provincial government funding and assistance programs (e.g., NODC). The government of the Province of Ontario has declared that "it will be the aim of the government to continue to stimulate economic growth in Northern Ontario....."* and in doing so will emphasize the further development of the existing and potential resources of the areas. "The guiding principles will be diversification and import substitution: the development of a wider range of activities to improve the economic stability of the areas, and the production of goods and services which would otherwise come from the more prosperous parts of the province." (P. 31 Ontario's Future Trends and Options). Therefore, tourism development is a special concern in the Sault Ste. Marie-Wawa zone.

For the latest information about public assistance for tourism development, contact your Tourism Development Consultants in the Regional or District offices of the Ontario Ministry of Industry and Tourism.

*Ontario's Future Trends and Options (P.28)

APPENDIX A

NATURAL RESOURCES/FEATURES

TABLE A-1
NATURAL RESOURCES/FEATURES

COMPONENT	CHARACTERISTICS	APPLICATION TO TOURISM	PROBLEMS	IMPLICATIONS FOR TOURISM DEVELOPMENT
1) Physiography (Topography, Geology, Soils)	<p>.Majority of zone, excluding Sault Ste. Marie, north shore of Lake Huron and St. Joseph Island is predominantly hilly</p> <p>.The most notable relief occurs in conjunction with bedrock outcroppings along the Lake Superior shoreline</p> <p>.Igneous and metamorphic rocks of the Precambrian Shield underly most of the zone</p> <p>.St. Joseph Island and the peninsula west of Sault Ste. Marie are underlain by flat-lying sedimentary bedrock (mainly sandstone and limestone)</p> <p>.Soil texture throughout most of the zone consists of sandy till, with small pockets of silts and loams</p> <p>.Shallow soil cover is indicative of Sault Ste. Marie and suburban area, the Wawa area and some of the very steeply sloping land in the remainder of the zone</p>	<p>.Scenic nature of hilly terrain provides tourism appeal - topographic variety enhances the area's capability to support extensive recreation (e.g., viewing, scenic driving, hiking or walking, cross country skiing)</p> <p>.High land elevation and variety in slope present potential for ski hill development</p> <p>.Rock outcroppings (e.g., along Lake Superior shoreline) and bedrock features (e.g., Agawa Canyon, Ripple Rock-Desbarats, Potholes) are natural attractions that can be incorporated into group tours or personal sightseeing trips</p> <p>.Variety of rock that is native to the area is used by local craftsmen to make a great number of articles that can be sold as souvenirs or collected by the visitors themselves</p>	<p>.Hilly terrain and steep slopes, particularly along Lake Superior shoreline, provide physical and consequently financial barriers to development and limit accessibility</p> <p>.Nature of the underlying bedrock, soil texture and lack of soil cover are variables which singly or in combination can present development restrictions</p>	<p>.Majority of the hilly terrain can be expected to remain relatively undeveloped with participation in extensive recreation activities providing the major tourism appeal</p> <p>.Suitable areas could be developed for downhill skiing</p> <p>.The numerous geologic features in this zone should be given greater recognition as attractions and continue to be incorporated into tours</p> <p>.The types of tourism development or use focusing on these features must ensure the preservation of the features and their natural physical setting</p> <p>.Those areas where the resource base exhibits limited capacity to support development or use must be recognized and proposed development carefully monitored or, if warranted, prohibited</p>

(continued)

TABLE A-1 (cont'd.)

COMPONENT	CHARACTERISTICS	APPLICATION TO TOURISM	PROBLEMS	IMPLICATIONS FOR TOURISM DEVELOPMENT
1) Physiography (continued)	<p>Areas with high potential for mineral occurrence can be found just north of Sault Ste. Marie, north of Batchawana Bay and in the Mawa area</p>	<p>Both ongoing mining operations and abandoned mining sites can become cultural or historical tourist attractions</p>	<p>Land use conflicts between mining and tourism may arise, particularly when the natural resource base is the major attraction</p>	<p>Both ongoing and abandoned mine operations should be encouraged to become tourism attractions</p>
2) Water Resources/ Sports Fisheries	<p>The zone is characterized by a great variety of water features:</p> <ol style="list-style-type: none"> 1) Lake Superior and Lake Huron constitute western and southern boundaries of the zone 2) numerous lakes and fast flowing rivers characterize the interior <p>Zone lies entirely within the Great Lakes drainage basin - drained by such rivers as the Montreal, Batchawana, Goulais and Garden, among numerous other smaller rivers</p> <p>Species of sports fish found in the area include popular varieties such as lake trout, speckled trout, rainbow trout, pickerel and northern pike</p>	<p>The shoreline of Lake Superior exhibits exceptionally high capability for both intensive and extensive recreation (bathing, camping, cottaging, boating, viewing)</p> <p>The waters of the North Channel show tremendous potential for boating</p> <p>The shorelines of several inland lakes, St. Joseph Island and the North Channel have some good bathing beaches and stretches of shoreline suited to camping and cottaging</p> <p>Several rivers exhibit potential for canoeing and have been designated as canoe routes by the Ministry of Natural Resources (Figure A-1) (i.e., Magpie, Michipicoten, Montreal, Batchawana, Goulais, Sand, Garden and Mississagi Rivers).</p>	<p>Many of the inland lakes are oligotrophic and are extremely sensitive to deterioration of water quality and fish habitat in the form of nutrient loading</p> <p>These cold water lakes, particularly the many small ones, are relatively infertile and fish productivity on inland lakes is rated among the lowest in Ontario</p> <p>Sports fishery is declining in response to a number of factors:</p> <ol style="list-style-type: none"> 1) angling pressures (notably high angling pressure is concentrated along Highway #17 corridor, particularly in road accessible areas) 2) industrial fallout and heavy metal waste adversely affecting water quality 	<p>If water resources and sports fisheries are to continue to play an important role in tourism, water quality controls are required. Lake studies and management programs being conducted by the Ministry of Natural Resources are instrumental in the effort to maintain water quality</p> <p>Intensive cottage/accommodation development around lake trout lakes in combination with shallow soil would constitute a potential hazard</p> <p>Investigate the possibility of fish stocking programs and expansion of stocking program to include other types of game fish</p>

(continued)

TABLE A-1 (cont'd.)

COMPONENT	CHARACTERISTICS	APPLICATION TO TOURISM	PROBLEMS	IMPLICATIONS FOR TOURISM DEVELOPMENT
2) Water Resources/ Sports Fisheries (continued)		<ul style="list-style-type: none"> Waterfalls and rapids along the rivers offer excellent viewing opportunities The sports fisheries within the zone attract many visitors, particularly in the 'shoulder' and summer seasons 	<p>3) nutrient loading of water caused by ineffective sewage treatment facilities in both urban and cottaging areas</p> <p>4) sensitive nature of lake trout lakes</p> <ul style="list-style-type: none"> Lack of adequate information on lakes makes it difficult to manage them Lake Superior is perceived as being dangerous, deterring fishing and pleasure boating activities In the vicinity of St. Joseph Island numerous tourists staying in American resorts are fishing in Canadian waters. They require Ontario fishing licenses, but few benefits accrue to the Ontario tourism industry Commercial fisheries in Great Lakes are depleting sports fishery resources as a result of the fishing methods used 	<ul style="list-style-type: none"> Examine the possibility of restructuring cost of non-resident fishing licenses on the basis of whether the non-residents are staying overnight in Ontario Encourage spatial diversification of angling locations with a special focus on the Great Lakes where the Ministry of Natural Resources foresees the greatest potential for sports fishing in the future Provide boat charter services for fishing on the Great Lakes Ensure that adequate facilities (i.e., access points, launching ramps, marinas of various scales) are provided through public and private channels to satisfy the demand for boating Provide information/direction services that more adequately describe the water resources and related opportunities
3) Vegetation/ Wildlife	<ul style="list-style-type: none"> In the St. Joseph Island, Lake Huron shoreline and the Sault Ste. Marie areas the vegetation is predominantly hard maple, yellow birch, hemlock and white pine on sands, with white spruce and firs on well-drained clays 	<ul style="list-style-type: none"> Fall colours of the hardwoods do and will continue to attract visitors into the area 	<ul style="list-style-type: none"> Lumbering throughout the zone can represent a conflicting land use, particularly when fish and wildlife habitats are destroyed as a result of this activity. To date selective cutting has been practiced; however, the Ministry of 	<ul style="list-style-type: none"> Ensure that potential conflicts between the lumbering industry and tourism are minimized and high environmental quality is maintained Potential to develop lumber mills into attractions

(continued)

TABLE A-1 (cont'd.)

COMPONENT	CHARACTERISTICS	APPLICATION TO TOURISM	PROBLEMS	IMPLICATIONS FOR TOURISM DEVELOPMENT
3) Vegetation/ Wildlife (continued)	<p>North of Sault Ste. Marie to Wawa red and white pine are dominant on well-drained areas; hard maple, red maple and yellow birch are found in sheltered locations</p> <p>Vegetation in the Wawa area consists primarily of fir and poplar with some birch</p> <p>Several areas within the zone area botanically unique (e.g., Gros Cap, Wishart Park and Michipicoten Island)</p> <p>Timber capability within the zone ranges from moderate to high</p> <p>Lumbering occurs throughout the zone's interior. The timber rights are leased on virtually all Crown land</p> <p>The extensive areas of forest cover in this zone provide excellent habitat for popular game including moose, bear, deer and a variety of small game</p> <p>St. Joseph Island is a significant area for migratory waterfowl</p> <p>Area inland from the Lake Huron shoreline represents the northern fringe of the habitat suited to supporting deer populations</p> <p>Inland areas north of Sault Ste. Marie provide excellent moose habitat</p>	<p>Timber activities are of interest to travellers</p> <p>Hunting, in particular moose hunting, is an important attraction to visitors in the 'shoulder' season</p> <p>Spring bear hunting is also an attraction, drawing mainly American visitors</p> <p>Wildlife viewing appeals to numerous visitors</p>	<p>Natural Resources expects that pressures for clear cutting will increase in the near future</p> <p>Logging roads have made many areas accessible by car and are affecting fly-in resorts, the appeal of which lies in their remote image</p>	<p>The solution to declining moose populations over the long term depends on new and improved management techniques rather than on hunting restrictions which are now a necessity but which could become detrimental to tourism</p> <p>Management possibilities could include:</p> <ol style="list-style-type: none"> 1) setting aside more wildlife viewing areas 2) spatially dispersing hunting pressures by designating and rotating areas where hunting is permitted <p>Trapping activities of local residents could be of interest to visitors</p> <p>(continued)</p>

TABLE A-1 (cont'd.)

COMPONENT	CHARACTERISTICS	APPLICATION TO TOURISM	PROBLEMS	IMPLICATIONS FOR TOURISM DEVELOPMENT																															
3) Vegetation/ Wildlife (continued)	<ul style="list-style-type: none">.Bear are found throughout the zone.Fur bearing animals valuable for their pelts also found throughout the zone		<ul style="list-style-type: none">to hunt until one week after the hunting season has begun for the resident.Non-resident hunters are showing signs of discouragement and should this trend continue, 'shoulder' season tourism could be seriously affected	<ul style="list-style-type: none">.Perhaps the resources are approaching the maximum level of utilization																															
4) Climate	<ul style="list-style-type: none">.The zone lies in an area classified as having a modified continental climate with long, cold winters and short summers.The moderating influence of Lake Huron and Lake Superior is felt throughout the entire zone, manifesting itself in shorter, less severe winters.There is considerable variation in climate within the zone in response to latitude and distance from the Great Lakes shoreline.Length of Seasons*:<table><tr><th>Winter</th><th>1st Day</th><th>Last Day</th><th>Total Days</th></tr><tr><td>Wawa</td><td>Oct. 20</td><td>Apr. 20</td><td>183</td></tr><tr><td>Sault Ste. Marie</td><td>Nov. 10</td><td>Apr. 10</td><td>152</td></tr><tr><td>Gros Cap</td><td>Nov. 5</td><td>Apr. 10</td><td>157</td></tr><tr><td>Spring</td><td>1st Day</td><td></td><td>Total Days</td></tr><tr><td>Wawa</td><td>May 5</td><td></td><td>44</td></tr><tr><td>Sault Ste. Marie</td><td>Apr. 25</td><td></td><td>30</td></tr><tr><td>Gros Cap</td><td>Apr. 25</td><td></td><td>41</td></tr></table>	Winter	1st Day	Last Day	Total Days	Wawa	Oct. 20	Apr. 20	183	Sault Ste. Marie	Nov. 10	Apr. 10	152	Gros Cap	Nov. 5	Apr. 10	157	Spring	1st Day		Total Days	Wawa	May 5		44	Sault Ste. Marie	Apr. 25		30	Gros Cap	Apr. 25		41	<ul style="list-style-type: none">.Relatively short summer season and long winters increases risk of both seasonal and year round tourism establishments.Water temperature in Lake Superior is too cold for comfortable swimming; exceptions are shallow, sheltered bays..Many of the interior lakes in the northern portion of the zone have few days with water temperatures warm enough for swimming..Winter conditions make it difficult and expensive to maintain docks and launching facilities for boats.	<ul style="list-style-type: none">.Climatic conditions compare favourably with other locations in Ontario for several winter developments (e.g., downhill skiing, cross country skiing, snowmobiling)
Winter	1st Day	Last Day	Total Days																																
Wawa	Oct. 20	Apr. 20	183																																
Sault Ste. Marie	Nov. 10	Apr. 10	152																																
Gros Cap	Nov. 5	Apr. 10	157																																
Spring	1st Day		Total Days																																
Wawa	May 5		44																																
Sault Ste. Marie	Apr. 25		30																																
Gros Cap	Apr. 25		41																																

(continued)

TABLE A-1 (cont'd.)

COMPONENT	CHARACTERISTICS	APPLICATION TO TOURISM	PROBLEMS	IMPLICATIONS FOR TOURISM DEVELOPMENT																																							
4) Climate (continued)	<p>.Length of Seasons*: (continued)</p> <table><tr><td>Summer</td><td>Ist Day</td><td>Last Day</td><td>Total Days</td></tr><tr><td>Wawa</td><td>June 18</td><td>Aug. 29</td><td>73</td></tr><tr><td>Sault Ste. Marie</td><td>May 25</td><td>Sept. 17</td><td>116</td></tr><tr><td>Gros Cap</td><td>June 5</td><td>Sept. 9</td><td>97</td></tr></table> <p>Fall</p> <table><tr><td>Wawa</td><td>Total Days</td></tr><tr><td>Sault Ste. Marie</td><td>51</td></tr><tr><td>Gros Cap</td><td>53</td></tr><tr><td></td><td>56</td></tr></table> <p>.Mean daily maximum and minimum temperatures (°F.) at Sault Ste. Marie:</p> <table><tr><td></td><td>Maximum</td><td>Minimum</td></tr><tr><td>January</td><td>22</td><td>2</td></tr><tr><td>April</td><td>48</td><td>28</td></tr><tr><td>July</td><td>77</td><td>54</td></tr><tr><td>October</td><td>54</td><td>36</td></tr></table> <p>.Mean annual snowfall ranges from 85 in. in the Sault Ste. Marie Area to over 110 in. in the remainder of the region</p> <p>.Mean length of swimming season: -Sault Ste. Marie June 29-Sept. 5 - 69 days -Gros Cap June 28-Sept. 9 - 74 days</p> <p>.Typical water temperatures at mid-summer: -Lake Superior 65°F. -Lake Huron 66°F. -Inland Lakes 65-70°F.</p>	Summer	Ist Day	Last Day	Total Days	Wawa	June 18	Aug. 29	73	Sault Ste. Marie	May 25	Sept. 17	116	Gros Cap	June 5	Sept. 9	97	Wawa	Total Days	Sault Ste. Marie	51	Gros Cap	53		56		Maximum	Minimum	January	22	2	April	48	28	July	77	54	October	54	36		<p>.Winter tourism is limited because weather conditions reduce accessibility and low temperatures limit number of days comfortable for outdoor recreation activities</p>	
Summer	Ist Day	Last Day	Total Days																																								
Wawa	June 18	Aug. 29	73																																								
Sault Ste. Marie	May 25	Sept. 17	116																																								
Gros Cap	June 5	Sept. 9	97																																								
Wawa	Total Days																																										
Sault Ste. Marie	51																																										
Gros Cap	53																																										
	56																																										
	Maximum	Minimum																																									
January	22	2																																									
April	48	28																																									
July	77	54																																									
October	54	36																																									

*Definitions: WINTER: begins at any meteorological station with the median date for the 1st. inch of snowcover on the ground and ends with the median date of the last inch.

SPRING: begins 15 days after the median date of the last inch of snow cover and ends the day before mean daily maximum temperature rises above 65°F.

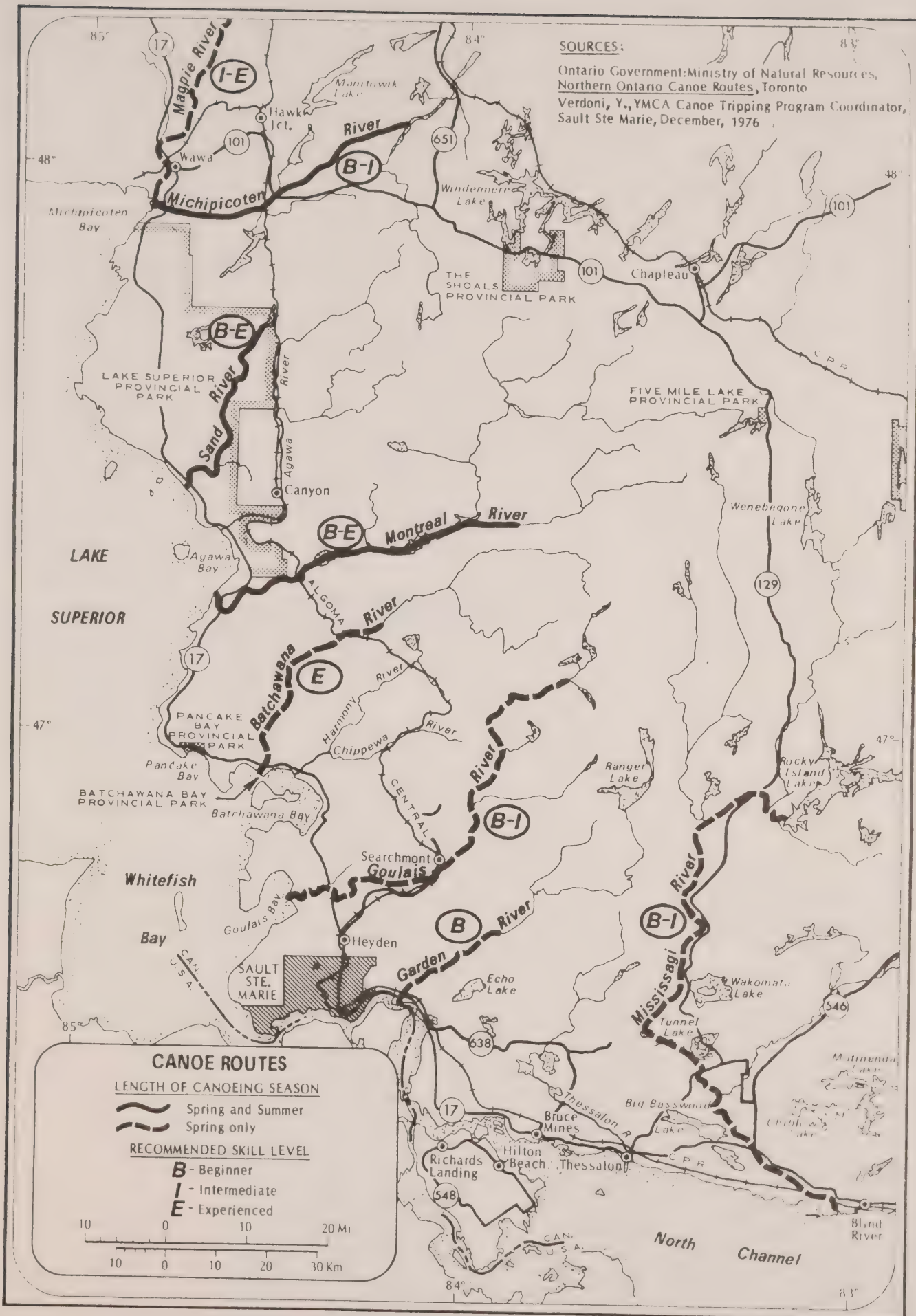
SUMMER: begins with the date at which the mean daily maximum temperature rises above 65°F. and terminates when it falls below this value.

AUTUMN: begins the day after the mean daily maximum temperature falls below 65°F. and ends the day before the median date of the 1st inch of snow.

Source of Climatic Data: Development of Tourism in Northern Ontario: Preliminary Planning Concept, 1973.

SOURCES:

Ontario Government: Ministry of Natural Resources,
Northern Ontario Canoe Routes, Toronto
Verdoni, Y., YMCA Canoe Tripping Program Coordinator,
Sault Ste Marie, December, 1976



APPENDIX B

HISTORICAL RESOURCES

TABLE B-1

HISTORICAL DEVELOPMENT OF THE SAULT STE. MARIE/WAWA ZONE: A CHRONOLOGY

Earlier inhabitants were Iroquois and Ojibway tribes (hunters and fishers) and some Algonquin in the St. Joseph Island and North Channel area.

1617

Etienne Brule and Grenolle reached the rapids of the Sault and named them Sault de Gaston in honour of the brother of King Louis XIV.

1654

The first of the famous Coureur-de-Bois, Radison and Groseilliers, travelled all over the Algoma area. They called it a country "par excellence" for its quantities of beaver, whitefish and game. They travelled by canoe and on foot with their Indian friends. Through the Indians they discovered the water route from Lake Superior via the Michipicoten River into Manitowik and Dog Lakes, then into Crooked Lake, which straddles the height of land - draining into the Missinabi and Moose Rivers into James Bay. This is the route which became one of the most important canoe ways of the fur trade for over 200 years.

1668

Radison and Groseilliers (after a disagreement with the French Governor in Montreal for leaving the colony and trading without a license) presented their findings to King Charles of England, resulting in two boats being sent into Hudson Bay. From this beginning, the Hudson's Bay Company was formed in 1670 and granted a Charter for all the lands draining into the Bay from the north, south and west.

1669

Other early contact with civilization was through religion. In 1669, Father Marquette established a Jesuit Mission at the Sault - changing the name from Sault de Gaston to Sault de St. Mary's.

1671

When Frontenac and his Intendent Jean Talon took over the fur trading office in Montreal, they immediately sent representatives to explore and take over all regions beyond the Great Lakes in the name of the King of France. This was done by Sieur Daumant de Saint Lussan in 1671 at Sault de St. Mary's, claiming all the regions discovered and yet to be discovered to the northern, western and southern seas.

1685 - 1700

The French traders established trading posts all around the shores of Lake Superior; two significant posts were located at the mouth of the Michipicoten River and in Sault de St. Mary's.

1771

From the early 1700's Sault developed into a major supply depot and funnel for east-west traffic along the Great Lakes. A shipyard was built in 1771, at Point Aux Pins, by Alexander Henry because of this flourishing traffic.

1779

The northwest traders found the long portage at Sault de Ste. Mary's a great handicap to their trade and in 1797 built the first canal and lock.

1796

Fort St. Joseph was established as a trading post as well as a protecting British fort for the area.

1798

To ensure St. Joseph Island's safety, it was purchased outright from the Chippewa Nation on June 30.

1812

From Fort St. Joseph, Captain Charles Roberts, with a small band of Canadians, a few red-coated soldiers and some 300 Indians in canoes, sailed to Mackinac Island to attack the fort. The surprise attack resulted in the capture of the American fort without a shot being fired.

1812 - 1814

During the War of 1812, the Americans under Major Homes attacked the fort at the Sault. Captain McCargo and the crew of the Nor'West Schooner escaped and took refuge at Thehipicoten. When they returned, they found their furs stolen and everything, including the locks and the schooner, burned.

1821

For many years there was much competition between the Hudson's Bay Company and the North-West Company. The competition became so fierce that both were in danger of bankruptcy or an eruption into violence and bloodshed. In 1821 the Moose River system was the main transportation and supply route. The annual collection of furs, especially from Lake Huron and Lake Superior occurred at the Michipicoten Post.

1850's

With the stimulus produced by a copper boom on the American side of Lake Superior and results of the Geological Survey of Canada (1842), interest was aroused in the possibilities of mineral exploitation in the region. A number of isolated attempts were made to mine copper in various locations (e.g., Michipicoten Island), but Bruce

TABLE B-1 (cont'd.)

HISTORICAL DEVELOPMENT OF THE SAULT STE. MARIE/WAWA ZONE: A CHRONOLOGY1850's (continued)

Mines was the only site where substantial production was achieved. A community was developed at Bruce Mines and was described as "a small, impoverished community of British miners working and living in conditions similar to mining in pre-industrial Britain".

1883-1885

The 1st Trans-Continental Railway (C.P.R.) was under construction; one of the toughest parts of the construction was across the north shore of Lake Superior from Missinabi to Nipigon. To complete this section of the railway, rails and supplies were delivered by boat at Michipicoten Harbour and were then transported overland to the construction crews on the C.P.R. Mr. James Conmee was given the contract and he hired a group of Mormon teamsters to freight material from the Harbour to Missinabi. The present site of Wawa was one of the camps for these freighters and Wawa Lake was part of their 'freight-trail'. The Mormons built a corduroy and gravel road from Michipicoten Mission into Wawa (which is still in use today). Folk tales tell of a massacre of some of the Mormons by Indians several miles down the shore of Lake Superior. With the completion of the C.P.R., Michipicoten became a sleepy little Mission and Indian village.

1863

The northern fur trading route (from Michipicoten to James Bay) was abandoned in preference for the eastern route and all areas were transferred to the Montreal Department. For the Lake Superior and more westerly regions, Sault Ste. Marie became the primary location from which provisions departed to the posts and fur returns were sent to Montreal.

1870's

Substantial settlement began on St. Joseph Island and the North Shore. Some of Northern Ontario's most fertile pockets were settled here, but the rugged and broken topography impaired the cohesion of the community and the competition of resource industries weakened agriculture's economic attraction. Most of the settlers were English Old Ontarians, frequently from the poorer soil countries.

1885

The 1st American canal and lock were opened at Sault Ste. Marie

1890's

A pulp and paper mill was established in Sault Ste. Marie to supply the Canadian domestic market. After the abolition of an American tariff on news-print imports, markets in the United States became very important.

1897

William Teddy (an Indian trapper) and his wife discovered gold when stopping for their noon-day camp at Wawa. Claims were staked on the land now known as MacKay's Point and the 'Gold Boom' was on. William Teddy was paid \$500 for his find and for a time revelled in being 'King of the Castle'. Ruins of seven gold mines remain today (Darwin (Grace) Mine, Parkhill Mine, Deep Lake Mine and S.B. Smith, Minto Mine, Jubille Mill, Pursides Gold Mine, Stanley Prospect and Cooper Trenches).

1898

Iron ore was discovered in the Wawa area during the height of the gold mining boom. Francis Hector Clergue - a man of great vision and optimism - took a steamship to Michipicoten from the Sault, and on the shores of Boyer Lake found a virtual mountain of iron ore. He purchased the claims and opened up the 'Helen' Iron Mine. Almost simultaneously, construction was started on a steel mill at the Sault, opening the Helen Mine, developing the Harbour and ore docks and a railway line from the Harbour to the Helen. Mr. Conmee, who had been the contractor for the C.P.R. rail haul, was given the contract to construct the railway line through to the Helen (1899-1900). Later, the rail line was completed to Hawk Junction (1912). A spur line was also built to the Magpie Mine in 1910-1912.

1899

Construction of the Algoma Central Railway was started by Francis Hector Clergue. The railway was necessary to open up the hinterland and to make available the vast potential wealth locked in the rugged hills. At the time of the industrial crash in 1903, rail had been laid to Mile 56 on the main line north from Sault Ste. Marie. To build the section of the railway from Michipicoten Harbour, all construction material, locomotives, freight cars, etc., were transported by boat to that point and the vessels Manitou and Caribou were utilized for this service. The main line north from Sault Ste. Marie was connected at Hawk Junction with the branch line to Michipicoten in 1911 and in 1914 was continued to Hearst.

HISTORICAL THEMES

The majority of the historical themes are based on economic activities and their associated lifeways. The themes related how improved access to the wilderness permitted the settler to take increasing advantage of the opportunities offered by the natural resource base. What remains in the area today is an 'accessible wilderness' which holds great recreation appeal. Since the historical themes are linked closely to the development of this 'accessible wilderness' image, the management, interpretation and presentation of the historical resources is of major interest to the zone's recreation industry.

Fur trading, lumbering, mining and transportation have been most influential in creating access to the wilderness. These themes and their potential for development in the recreation context are examined in detail on Table B-2.

The native Indian population, agriculture, fishing, past military activity, development of recreation and the history of art are also important to the area's heritage. These themes and related historical resources can also form the focus for recreation developments (i.e. attractions, events, community theming).

The native Indian theme is indicative of a time when indigenous people's societies and value systems were still coherent, but when interacted with the European technology, economy, society and religion began to precipitate change. Settlement in the north eventually shifted native settlement patterns from hunting and fishing to a wage-based economy. Today the native culture and identity prevails to varying degrees on the Indian reserves located within the zone.

The agricultural theme deals with the cultivation of soil for subsistence and commercial purposes and with associated lifeways. Fisheries are also included in this theme by virtue of historical affiliation.

During the 1870's, substantial settlement began on St. Joseph Island and the North Shore. Some of northern Ontario's most fertile pockets were settled here but rugged, broken topography impaired the cohesion of communities and competition of the resource industries weakened agriculture's economic attraction. In terms of agriculture, old Ontario reached the outer limits of its natural north-west expansion in the Searchmont vicinity. The appealing pastoral landscapes of St. Joseph Island and to the north of Highway 17E attest to historical importance of agriculture in these areas. Commercial fishing activity peaked in Lake Huron in the early 1890's and in Lake Superior shortly thereafter. Fishing was significant in the early years of some North Channel communities (e.g. Thessalon). However, while the Upper Lakes fisheries were economically and socially important in various places at various times, no where were they dominant in creating and shaping lasting communities.

The military theme deals with activities and lifeways associated directly with actions of armed forces in the defence or maintenance of territorial integrity. The Fort St. Joseph historical site was the point of departure for the company of British soldiers, voyageurs and Indians who captured Mackinaw in 1812. The site now in ruins, is in the process of being developed. The grounds are open to picnickers and guides are available for interpretive tours.

The history of recreation in this zone also presents an interesting theme. The first tourists in Algoma (1837) were aristocratic travellers and artists attracted by the wilderness. By 1890 a class of wealthy tourists, largely from Detroit and Chicago, began to employ the area north of Sault Ste. Marie. The two characteristic forms of recreation until the opening of the highway were excursion, hunting and observing and establishments of northern retreats. Examples of tourist architecture are retreats developed in the 1940's: Agawa Lodge and Beaver Rock Lodge. Changes in the nature of recreation related closely to the development of transportation systems which increased access to this wilderness area.

Finally, the history of art also merits exploration as a theme. Artists drawn by the spectacular wilderness landscapes were among the first visitors to the area. Among the more recent visitors was Dick Ferrier who, in 1973, executed numerous paintings in Lake Superior Park.

TABLE B-2

HISTORICAL RELATIONSHIPS AND TOURISM IMPLICATIONS FOR THE SAULT STE. MARIE/WAWA ZONE

*THEME	HISTORICAL REMNANTS & EXISTING DEVELOPMENT OF HISTORICAL RESOURCES	APPLICATION TO TOURISM	IMPLICATION FOR TOURISM DEVELOPMENT	APPROPRIATE LOCATION FOR THEME DEVELOPMENT
<p>FUR TRADE:</p> <p>.This theme deals with the trading of fur-bearing animals for commercial purposes and with the communities which were directly involved and economically dependent on those activities.</p> <p>.During initial phases (1680-1820) fur trading activity in the Sault Ste. Marie/Wawa area had marginal social and economic impact on the province at that time.</p> <p>Michipicoten and Sault Ste. Marie, established as trading posts, acted as bases for westward exploration.</p> <p>.During the latter phase of the fur trade era (1821-1880) the area became the centre for intensive development of diversified aspects of the fur trade and a crucial component of contemporary fur trading activities.</p>	<p>.Important historical sites relating to the fur trading era include: the trading posts of Michipicoten, Sault and Fort St. Joseph and the Michipicoten-James Bay Canoe Route.</p> <p>.Existing tourism developments incorporate this theme to a very limited degree. Attractions which relate to the fur trade include Fort Friendship (Michipicoten), Fort St. Joseph National Historic Park and St. Joseph Island Museum (St. Joseph Island), the Old Stone House, Lock Tours and the restored canoe lock commemorating the first Sault Ste. Marie Canal (Sault Ste. Marie).</p>	<p>.Fur trading represents a first step in the exploration and utilization of area's wilderness resources by Europeans. Interaction between the indigenous and European cultures and European settlement of the area was initiated by the establishment of the trading posts.</p> <p>.The fur trade theme can be readily developed within the context of the 'accessible wilderness' image of the zone.</p> <p>.The fur trade theme can form the unifying element around which numerous tourism-related developments are established.</p>	<p>.The fur trade theme should be more comprehensively developed in the existing attractions which now incorporate the theme.</p> <p>.New tourism attractions and events which focus specifically on this theme should be developed (e.g. cultural events, tours, museums, restoration of trading posts such as the Hudson Bay Post at Michipicoten).</p> <p>.Community theming/entrance development can utilize the theme to increase their appeal to the visitor.</p>	<p>.Sault Ste. Marie .Wawa-Michipicoten .St. Joseph Island (Fort St. Joseph)</p>
<p>LUMBERING:</p> <p>.This theme deals with the use of forest resources for commercial and subsistence purposes and with those communities whose economics focused on the lumbering industry and/or the pulp and paper industry.</p> <p>.For a brief period (1870's) the north shore of Lake Huron was one of the most important lumbering areas in the province. The square-timber operation commenced</p>	<p>.The lumbering and the pulp and paper industry are on-going economic activities throughout Sault Ste. Marie/Wawa zone.</p> <p>.Related manufacturing industries include Birchland Veneer Mills and Midway Lumber Mills (Thessalon), Weidwood of Canada Ltd. (Searchmont) and Weyerhaeuser (Ontario) Ltd. and the Abitibi Pulp and Paper Mill (Sault Ste. Marie).</p>	<p>.Lake Superior was the last and hardest logging frontier to penetrate.</p> <p>.Historically, the lumbering industry is strongly linked to the 'accessible wilderness' theme. In early years logging operations were totally dependent on water for shipment of logs, supplies and men. Penetration of the wilderness by rail (A.C.R. 1912) provided an alternative means of</p>	<p>.Visitors need to be made more aware of existing tours related to lumbering.</p> <p>.The historical perspective of the lumbering industry requires amplification.</p> <p>.Tours should stress the historical importance of the industry in the area's economic and social development and past methods of logging as well as interpreting modern operations.</p>	<p>.Thessalon .Sault Ste. Marie .Wawa .Searchmont</p>

(Continued)

TABLE B-2 (continued)

HISTORICAL RELATIONSHIPS AND TOURISM IMPLICATIONS FOR THE SAULT STE. MARIE/WAWA ZONE

*THEME	HISTORICAL REMNANTS & EXISTING DEVELOPMENT OF HISTORICAL RESOURCES	APPLICATION TO TOURISM	IMPLICATION FOR TOURISM DEVELOPMENT	APPROPRIATE LOCATION FOR THEME DEVELOPMENT
<p>In Thessalon but it was a different kind of lumber industry that continued to spread west and north over the next 100 years. The character of the industry changed in favour of saw logs, followed by pulp and then by hardwoods for veneer.</p> <p>Mills established in Sault Ste. Marie (late 1890's) to supply the domestic market with pulp and paper products became important suppliers of newsprint to U.S. markets. At the turn of the century Sault Ste. Marie became the centre of wood production on the upper great lakes.</p>	<p>Existing tourism attractions related to the lumbering theme are industrial tours: the Hardwood Timber Trail and Limited/ scheduled tours by Weyerhaeuser Ltd. and Weidwood of Canada.</p> <p>In Blind River, just east of the zone, the Timber Village Museum portrays the history of the lumbering industry. The museum uses artifacts, models and full scale replicas of lumber camp buildings.</p> <p>Historical interpretation of this industry within the zone is limited.</p>	<p>transporting supplies and men. Modern operation is entirely road based. The continual pushing through of logging roads has made the zone's interior accessible and occasioned controversy in the last ten years. Road access to fly-in tourist camps has undermined their main appeal: remoteness.</p> <p>The history of the logging industry and current operations can form a thematic form for tourism attractions /events and community theming. This theme lends itself readily to interpretation because of the significance of the lumbering to the area's development and the industry's continuing importance.</p>	<p>Tours should be augmented by displays of equipment and techniques relating to past and current operations.</p> <p>Boat tours/cruises and rail tours should incorporate this theme focusing on the historical links between logging and these transportation forms.</p> <p>Events centering on the zone's cultural heritage can incorporate demonstrations of trade skills related to past and present lumbering procedures.</p> <p>Lumbering can be used in theming within communities. This theme is particularly appropriate in Thessalon where the lumbering industry had and has great economic significance.</p>	<p>Seven gold mine site south of Wawa Lake</p> <p>The copper mines north of Ophir and at Bruce Mines</p> <p>Copper mines north of Batchawana Bay Sault Ste. Marie (steel production)</p> <p>Wawa (gold, iron mining)</p> <p>Bruce Mines (copper mining)</p>
<p>MINING:</p> <p>This theme deals with the economics and technology involved in the recovery and processing of metallic and non-metallic minerals and with those communities whose economic lives centred on those activities from the first European attempts to exploit the mineral resources to the capital intensive mining and refining of today.</p>	<p>Today iron mining and smelting is still of tremendous economic importance in the zone. Wawa is now supported almost entirely by iron mining activity. Algoma Steel remains the major employer in Sault Ste. Marie.</p>	<p>Historically, mining greatly influenced settlement patterns within this zone. It was perhaps more than any other activity responsible for shaping access to the wilderness.</p>	<p>Interest in the zone's mining history can be stimulated by the development of regularly scheduled tours to abandoned mining sites. Such tours should include an interpretation of the mine's historical development and its impact on the settlement and economic development of the area.</p>	

(continued)

TABLE B-2 (continued)

HISTORICAL RELATIONSHIPS AND TOURISM IMPLICATIONS FOR THE SAULT STE. MARIE/WAWA ZONE

*THEME	HISTORICAL REMNANTS & EXISTING DEVELOPMENT OF HISTORICAL RESOURCES	APPLICATION TO TOURISM	IMPLICATION FOR TOURISM DEVELOPMENT	APPROPRIATE LOCATION FOR THEME DEVELOPMENT
<p>.Early mining enterprise in the area begins with the copper boom (1845) at Michipicoten and Bruce and ends with advent of the gold boom at Wawa, the discovery of iron ore at Wawa (1897) and the construction of steel mills at Sault Ste. Marie.</p> <p>.The iron mines at Wawa were closed in 1921 until technological advances permitted the lower grade ores to be processed economically. Mining activities were resumed in 1937; a number of new mines were brought into production at Wawa and production has been continuous since then.</p>	<p>.The mining theme is the historical theme which appears to have been most developed from a tourism standpoint.</p> <p>.There are countless sites of copper, gold and iron mining activities which have been pointed out as points of interest in travel literature but few have been developed to any degree as tourist attractions that will hold the interest of visitors for any length of time. Among the developed attractions are: the Bruce Mines Museum commemorating that community's history and related copper mining activities; Fort Friendship which houses artifacts depicting the gold and iron mining activity in the Wawa area but which is now closed to the public; organized tours including tours of the historic gold mines near Wawa, the Ranwick Uranium Mines, Algoma Ore Properties (Wawa) and the Algoma Steel Mills (Sault Ste. Marie).</p>	<p>.Copper proved to be the vanguard of settlement in this region. A number of isolated attempts were made to mine copper in various locations; no community development occurred except at Bruce Mines, the only site where substantial production was achieved.</p> <p>.Iron mining and smelting had a more significant impact on the economic and social development within this zone. Wawa, which had its beginning in the "Gold Rush" is now supported almost entirely by iron mining activity. Production of iron and steel at Sault Ste. Marie has attracted secondary industry and has been a major factor contributing to its development into a major industrial and commercial centre.</p> <p>.This theme shows tremendous potential for future development as a tourism resource. Travel literature has already pointed out the historical importance of mining activity in the zone. The numerous mining-related structures and landscapes, yet undeveloped, can readily serve as the centre point for the development of attractions/events, particularly organized tours.</p>	<p>.Better access should be developed to these sites to facilitate independent exploration as well.</p> <p>.Rail, boat and bus tours should incorporate the mining theme demonstrating the historical link between these modes of transportation and the mining activity.</p> <p>.Events or festivals relating to early mining days would be of interest to visitors.</p> <p>.Displays of early and modern mining equipment and techniques should be made more comprehensive and should be better interpreted.</p> <p>.All of the larger communities in the zone (Sault Ste. Marie, Wawa, Bruce Mines) could adapt the mining theme to create an identity with tourism appeal. The cultural heritage of the communities should be interpreted as it relates to the advent of mining (e.g., Cornish miners in Bruce Mines).</p>	

(continued)

TABLE B-2 (continued)

HISTORICAL RELATIONSHIPS AND TOURISM IMPLICATIONS FOR THE SAULT STE. MARIE/WAWA ZONE

*THEME	HISTORICAL REMNANTS & EXISTING DEVELOPMENT OF HISTORICAL RESOURCES	APPLICATION TO TOURISM	IMPLICATION FOR TOURISM DEVELOPMENT	APPROPRIATE LOCATION FOR THEME DEVELOPMENT
<p>TRANSPORTATION:</p> <p>This theme deals with the inter-connecting of economies and communities through the development of transportation networks from the inception of substantial and relatively stable European settlement to the rise of the contemporary urban industrial economy and society.</p> <p>Transportation networks which in the historical context exhibit particular importance in this zone are: shipping, rail, roads and air.</p> <p>The Sault Ste. Marie Canal (1895) is crucial to the St. Lawrence-Great Lakes shipping which was and is the principal strategic transportation corridor linking economies and communities of northern Ontario with those in the south and with markets and supply centres in Europe. This shipping route was instrumental in the development of this zone's fur trading, lumbering and mining industries.</p> <p>The development of the Canadian Pacific Railway (1885) was more than any other factor responsible for the economic development and settlement of northern Ontario. Also important was the Canadian National Railway System (1925) and its forerunners. These systems in conjunction with the Algoma Central Railway, linking industry within this zone.</p> <p>The establishment of a modern hard-surfaced highway system has been important to integration of the twentieth century economics and communities.</p> <p>The development of the airplane (1920's) was a significant phenomenon in opening northern Ontario to exploration.</p>	<p>The modern transportation network within the zone reflects the historical development of shipping, rail, road and air transportation.</p> <p>Routes of historical importance include the Michipicoten-James Bay canoe route, the canal and lock development at Sault Ste. Marie, the Algoma Central Railway construction from Sault Ste. Marie to Hawk Junction to the Michipicoten mines, the last stretch of the Trans Canada Highway opened in 1962, 38 miles north of Sault Ste. Marie.</p> <p>Transportation as a historical theme has received some recognition through the lock tours at Sault Ste. Marie, the Agawa Canyon Rail Tour, the Marine Museum at Sault Ste. Marie. Historical plaques commemorate the Michipicoten-James Bay Canoe Route, the opening of the Trans Canada Highway and Superior's first shipyard (Point aux Pins).</p> <p>This section of the Trans Canada has been designated as a scenic route.</p>	<p>The transportation theme explains how current patterns of access to the wilderness took shape.</p> <p>This theme could be developed in conjunction with the fur trade, lumbering and mining themes to explain the area's economic and social development. This form of historical interpretation would certainly be of interest to visitors to the zone.</p>	<p>The roles of the various modes of transportation in the economic and social development of the communities within the zone need interpretation.</p> <p>Narrated tours by various transportation modes along historically significant routes would be the best manner of interpreting the transportation themes.</p>	<p>Throughout the zone.</p>

*THEME definition has been adapted from A Topical Organization of History.

APPENDIX C

ACCOMMODATION

TABLE C-1

ACCOMMODATION

CHARACTERISTICS	OCCUPANCY	PROBLEMS	IMPLICATIONS FOR TOURISM DEVELOPMENT
TYPE (Commercial): Licensed Hotels/Motor Hotels - 34 No. of Units: 1400 approx. Motels - 69 No. of Units: 1200 Resorts/Camps - 48 No. of Cottages/Rooms: 400 Rental Cottages/Cabins: 54 No. of Cottages/Cabins: 250 Trailer Parks/Campgrounds: 34 No. of Sites: 1200 approx. Outpost Sites: 45 (M.N.R. Sites Only) Non-Commercial 2nd Residences: 4,453 Provincial Park Campgrounds: 674 sites	Average in Algoma Area ¹ : Year July January 1968 97% 42% 1969 82% 27% 1970 84% 30% 1971 58% 39% 1972 73 41% 1973 77% 23% 1974 66% 43% 1975 - 68% during July - Motels (Not LLB) and rental cottages had highest occupancy rates every year during January - Hotels/Motor Hotels (LLB) tended to have higher occupancy rates than motels	.Resorts/Lodges tend to be small in this area (compared to rest of province) and thus can't support associated recreation facilities (e.g., golf course, tennis courts) .Fly-in resorts/camps have difficulty getting staff .Few resorts have option of American Plan and Housekeeping Plan, thus not responding to shift in demand for housekeeping .There is a large bus tour market but outside of Sault Ste. Marie and Wawa, no establishments can accommodate them	.Need to investigate the demand of large scale resort providing a number of recreational facilities .If large resort is feasible, it should be located near a major highway to service bus tour market .Existing resorts should investigate the feasibility of offering the option of American Plan or Housekeeping Plan
LOCATION OF COMMERCIAL: City of Sault Ste. Marie: LLBO Hotels/Motor Hotels: 866 units Motels: 618 units Trailer Parks/Campgrounds: 3 Hwy. #17 Corridor (from S.S.M. to Provincial Park Boundary) LLBO Hotels/Motor Hotels: 59 units Motels: 62 units Resorts/Camps: 134 cottages or rooms Rental Cottages/Cabins: 47 Trailer Parks/Campgrounds: 190 sites St. Joseph Island LLBO Hotels: 19 units Motels: 17 units Rental Cottages/Cabins: 22 Trailer Parks/Campgrounds: 120 sites	Average for Sault Ste. Marie ¹ Year July January 1972 94% 42% 1973 73% 23% 1974 N/A 49% 1975 78% 31% 1976 N/A 22% The following are estimates of occupancy rates, etc. based on conversations with operators throughout the zone. Wawa: Peak Season July and August; Occupancy during peak Season 90-95%; Average length of stay - 1 night	.Rates of accommodation are high/can't compete on national basis, and especially Sault Michigan .Many visitors to Agawa Canyon Train Excursion are staying overnight in Sault Michigan because of lower rates .Many places during peak season won't take singles, and if they do, charge double rates .Occupancy in year-round establishments are very low during the winter months--appears to be the result of abundance of hotel/motel units	.Need to investigate the feasibility of economy class accommodation in the Sault Ste. Marie area .There is no apparent need for hotel/motel units .Convention facilities should be investigated to determine whether or not this market could improve occupancy rates during the winter and shoulder seasons

¹Commercial Accommodation Establishment Occupancy, TRB, OMIT, July 1976

(continued)

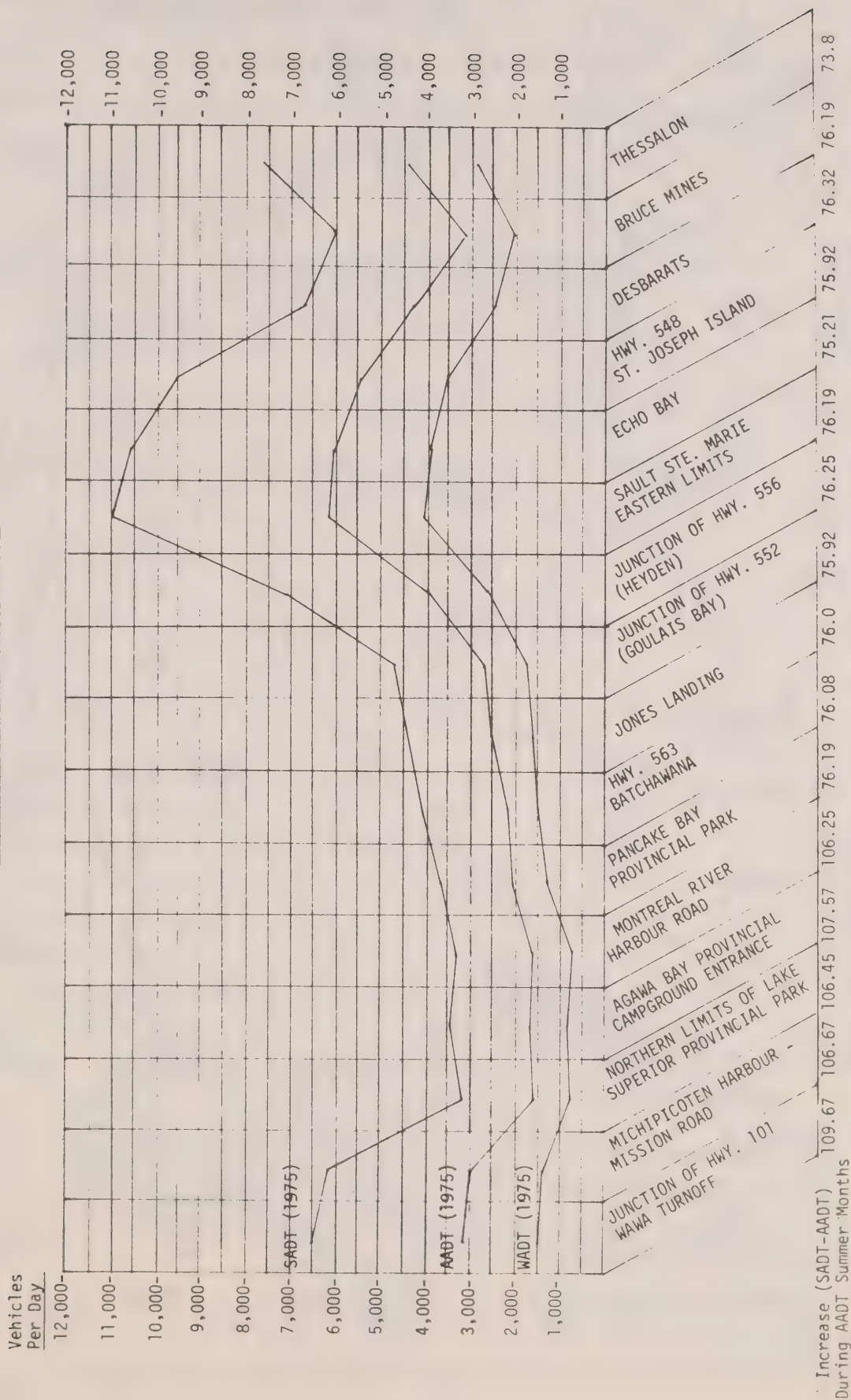
TABLE C-1 (cont'd.)

CHARACTERISTICS	OCCUPANCY	PROBLEMS	IMPLICATIONS FOR TOURISM DEVELOPMENT
<p>Hwy. #17 East (from S.S.M. to Thessalon)</p> <p>LLBO Hotels/Motor Hotels: 107 units</p> <p>Motels: 173 units</p> <p>Resorts/Camps: 146 cottage units</p> <p>Rental Cottages/Cabins: 133</p> <p>Trailer Park/Campground: 332 sites</p> <p>Wawa and Area (Including Lake Superior Prov. Park and Area East)</p> <p>LLBO Hotels/Motor Hotels: 250 units</p> <p>Motels: 235 units</p> <p>Resorts/Camps: 65 cottages or units</p> <p>Rental Cottages/Cabins: 20</p> <p>Trailer Parks/Campgrounds: 350 sites</p> <p>.Almost 50% of the licensed establishments are found in Sault Ste. Marie</p> <p>.High % of the resorts and rental cottages/cabins are found east of the Sault - along Hwy. #17 and on the many inland lakes</p> <p>.Outpost camps predominantly found east of Hwy. #17 north and south of the provincial park</p> <p>.High frequency of seasonal residences found within a 60 mile radius of the Sault</p> <p>-high % along Lake Superior Shoreline to and including Batchawana Bay</p> <p>.Wawa and Hawk Junction are bases for fly-in resorts and camps of which many are not included in the figures because they are not within the area of study</p>	<p>St. Joseph Island: Peak Season July and August; average length of stay 2-3 nights</p> <p>Resorts (Road Access)</p> <p>Average length of stay 1 week; Peak Season July and August; mid May-June 30 and Sept. 1-mid October good occupancy - 60-65%</p> <p>Fly-in Outpost Camps</p> <p>Peak Season middle of May to end of June and 1st of Sept. to freeze-up. Average length of stay flying from Sault is 3 days and 4 days flying from Wawa</p> <p>Fly-in Resorts</p> <p>Peak Season June and July. May, Aug. and Sept. are also good; Hunters in October and November; Average length of stay 3-5 days</p>	<p>.Fly-in outpost camp operators insecure because of Ministry of Natural Resource's policy on land-use permits which must be renewed every year</p> <p>.Many fly-in camp operators are not scheduling time of air services, which is discouraging return visitation</p> <p>.Low occupancy during July and August at fishing and hunting camps</p> <p>.Resort/camp and rental cottages/cabin operators are struggling to maintain their once good spring and fall hunters/fishermen markets</p>	<p>.Investigate the possibility of Ministry of Natural Resources offering longer term leasing program</p> <p>.Fishing and hunting camps must diversify their appeal</p>

APPENDIX D

TRANSPORTATION

FIGURE D-1
TRAFFIC VOLUME ON HIGHWAY #17 (1975)



SOURCE: 1975 TRAFFIC VOLUMES - ON THE KING'S HIGHWAY AND SECONDARY HIGHWAYS, MINISTRY OF TRANSPORTATION AND COMMUNICATIONS

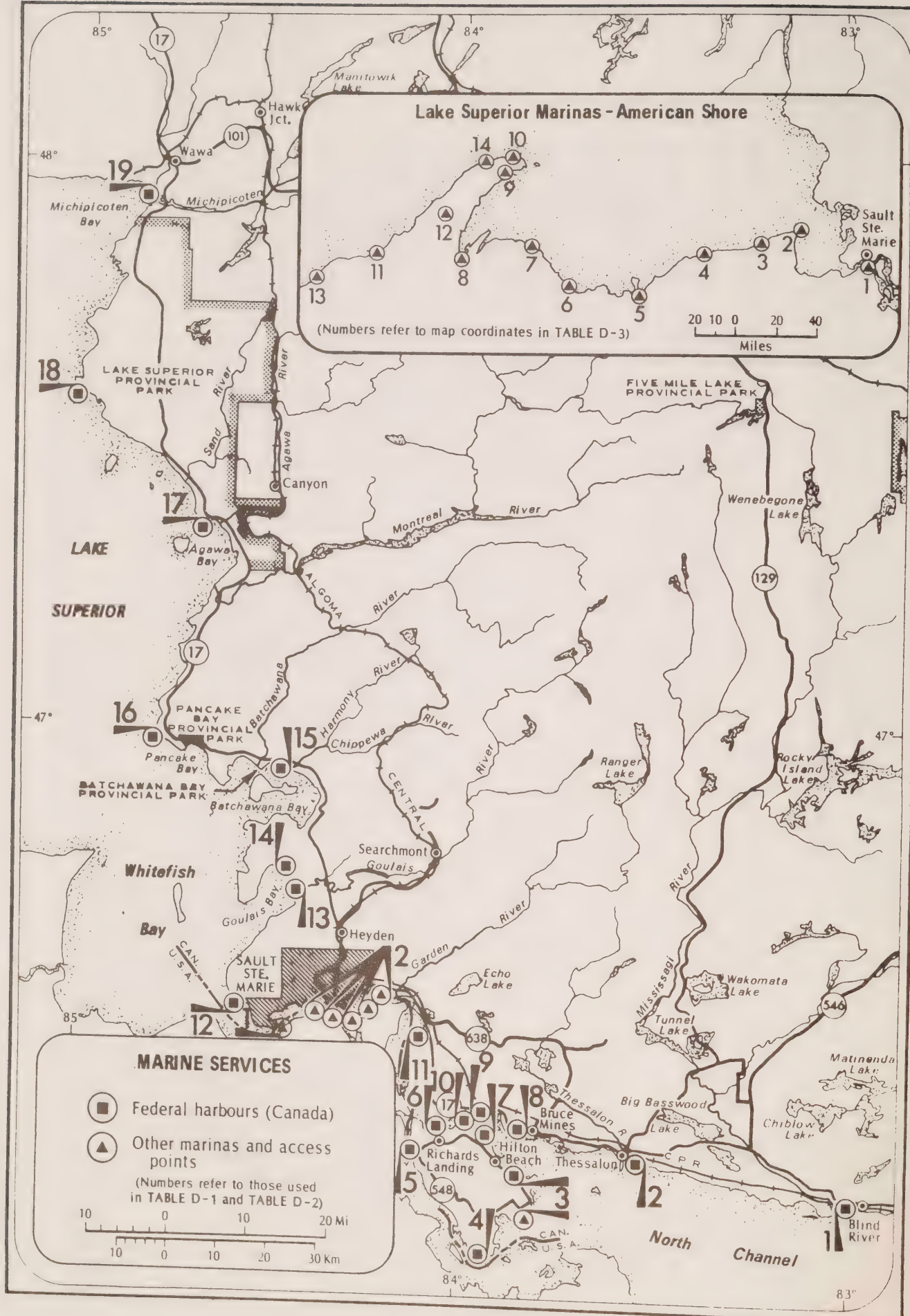


TABLE D-1
MARINE SERVICES - FEDERAL HARBOURS

<div style="display: flex; align-items: center;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg);">MAP COORDINATE</div> <div>HARBOUR</div> </div>		FACILITIES (Refer to Figure D-2)							
		FUEL	LAUNCH FACILITIES	ANCHORAGE	SERVICES	REPAIRS	RENTALS	SUPPLIES	GENERAL FACILITIES
1	Blind River	G, D	R, CP	DO		MO		S, W, I	T, L, CS, HM, CG
2	Thessalon	G, D	R, CP	DO, M	P, GD	MO	WT	S, W, I	T, L, CS, HM, CG
3	Hilton Beach	G, D	R, CP	DO	GD	MO		S, W, I	T, CS, HM, CG
4	Sterling Bay								
5	Sailor's Encampment		R	DO					
6	Richard's Landing	G, D	R, CP	DO	P, GD	MO		S, W, I	T, L, CS, HM, CG
7	Gawas Bay			DO					
8	Bruce Mines	G, D	R, CP	DO		MO		S, W, I	T, L, CS, HM, CG
9	Desbarats	G, D	CP	DO	GD	MO		S, W, I	T, CS
10	Sucker Creek		R, CP	DO					
11	Echo Bay								
12	Gros Cap		CP	DO					
13	Grant's Landing		CP	DO					
14	Goulais Mission		R, CP	DO					
15	Batchawana		CP	DO					
16	Mamainse Harbour		CP	DO					
17	Sinclair Cove		R	DO					
18	Gargantua			DO					
19	Michipicoten River	G	CP	DO					

Codes: Fuel: G-Gas D-Diesel
Launch Facilities: R-Ramp C-Crane/Rlwy. CP-Carpark
Anchorage: DO-Dockage M-Mooring
Services: E-Electrical Conn. P-Pump-out Stn. GD-Garbage Disposal
Repairs: MO-Motor H-Hull SA-Sail
Rentals: BR-Boat MR-Motor WT-Water Taxi
Supplies: S-Store W-Water I-Ice
General Facilities: T-Phone RR-Restrooms SH-Showers L-Liquor
CS-Eating Fac. HM-Hotel/Motel CG-Camping

Source: Guide to Federal Harbours Ontario, N.D. (Map).

TABLE D-2
OTHER MARINAS AND ACCESS POINTS
(Refer to Figure D-2)

Map Coordinate	Harbour	Facilities
1	Pointe Louise	Marina, Ramp, Dock
2	Marine Facilities in Sault Ste. Marie	Canax Marina, Algoma Sailing Club, Holder Marina, Catsky's, East End Marina
3	Milford Haven	Marina, Dock

Source: The Georgian Bay-North Channel Access Study, Volume 1.
March 1976

TABLE D-3

AMERICAN SHORE LAKE SUPERIOR MARINAS - 1973

(Refer to Figure D-2)

Map Coordinate	Marina	No. of Boat Accommodation	Visitors Accommodation	Gasoline	Telephone	Water	Electricity	Restrooms	Shower	Dock Attendant	Holding Land Pump Out	Haul Out	Repairs	Supplies	Restaurants	Radio
1	Sault Ste. Marie - Municipal -															
2	Whitefish Point - SWH*-	10	2	x		x	x			x	x					
3	Little Lake - SWH -		5	x		x	x			x	x					
4	Grand Marais - SWH -	20	10	x			x	x			x					
5	Munising - Municipal -	10	6	x	x	x	x	x		x	x					
6	Marquette - SWH -	100	5	x	x	x	x	x	x	x	x					
7	Big Bay - SWH -	20	3	x	x	x	x	x	x	x	x					
8	L'Anse - SWH -	20	4			x										
9	Lac La Belle - Municipal -	20	10	x												
10	Copper Harbour - SWH -	20	10	x	x	x	x	x	x	x	x					
11	Ontonagon - Municipal -	40	10	x	x	x	x	x	x	x	x	x				
12	Houghton-Hanesch - SWH -	35	10	x	x	x	x	x	x	x	x	x				
13	Black River - SWH -	20	-	x		x		x								
14	Eagle Harbour	20	6	x	x	x	x	x	x	x	x					

*State Waterway Harbour

Source: North Shore Lake Superior Recreation Study. Volume 1, 1974.

APPENDIX E

MARKET BACKGROUND DATA

TABLE E-1

ONTARIO VISITORS TO THE SAULT STE. MARIE-WAWA ZONE

Total Ontario Visits - 1,646,000 (represents 62% of total person visits to zone)		
<u>Activity Related Expenditures</u>		
Activity	Expenditures (000)	% of total expenditures by Ontario Visitors
Sightseeing/Touring	2,700	17
Visiting Friends/Relatives	4,614	30
Personal/Family Affairs	3,051	20
Entertainment	1,025	7
Outdoor Recreation/Visiting Own Cottage/Resort Vacation	1,043	7
Shopping	805	5
Conventions	630	4
Other Business	1,652	10
Total Expenditures by Visitors Originating in Ontario	15,520	100
	(represents 41% of total expenditures by all visitors to the zone)	

(continued)

TABLE E-1 (continued)

TRIPS	WEEKEND	VACATION
<u>Origins</u>	<u>%</u>	<u>%</u>
Eastern Ontario	3	6
Lake Ontario	2	-
Central Ontario	6	26
Niagara	-	-
Lake Erie	5	11
Lake St. Clair	3	13
Midwestern Ontario	2	2
Georgian Bay	-	4
Northeastern Ontario	76	34
Northwestern Ontario	3	3
Total No. of Trips	100	100
	(% of)	(% of)
	(Total)	(Total)
	(Activity)	(Activity)
<u>Activities</u>	<u>(Days)</u>	<u>(Days)</u>
Visit Friends & Relatives	55	45
Cottaging	9	13
Shopping	8	6
Recreational Driving & Touring	8	5
Motor Boating	4	5
Visiting Zoo/Botanical Garden	4	4
Snowmobiling	2	3
Camping	2	3
Canoeing	2	3
Fishing	2	3
		Personal Nature Appreciation
Total Activity Days	100	100
	(% of)	(% of)
	(Total)	(Total)
<u>Accommodation</u>	<u>(Nights)</u>	<u>(Nights)</u>
Hotel/Motel	12	30
Resort/Lodge	-	-
Cottage/Chalet/Hobby Farm	18	2
Tent/Tent Trailer	7	6
Home of Friend/Relative	58	50
Travel Trailer/Mobile Home	3	5
Other	2	7
<u>Length of Stay</u>	<u>%</u>	<u>%</u>
1 day	27	-
2 days	43	-
3 days	16	-
Less than 1 week (4-6 days)	14	51
1 week	-	46
2 weeks	-	3
3 weeks or more	-	-

TABLE E-1 (continued)

TRIPS	WEEKEND	VACATION
<u>Transportation Mode</u>	<u>%</u>	<u>%</u>
Automobile	81	98
Rail	5	-
Bus	5	1
Air	-	-
Boat	-	-
Other	9	1
<hr/>		
<u>Party Size</u>	<u>%</u>	<u>%</u>
1 Person	10	10
2 Persons	26	25
3 Persons	16	23
4 Persons	18	20
5 Persons	9	8
6 Persons	9	2
7 Persons	5	4
8 or more	7	8
<hr/>		
<u>Party Composition</u>	<u>%</u>	<u>%</u>
Single Person	10	18
1 Family with Children	37	41
2 Families with Children	2	3
Organized Group	3	3
1 Couple Only	21	14
2 or More Couples	6	-
With a Friend or Friends	7	8
Other	14	3
<hr/>		
<u>Age</u>	<u>%</u>	<u>%</u>
12 - 19	23	19
20 - 34	27	24
35 - 49	30	38
50 - 64	10	9
65 plus	10	10
<hr/>		
<u>Education</u>	<u>%</u>	<u>%</u>
Grade 8 or less	29	35
Grades 9 - 13	56	57
Some University	2	8
University Degree	13	-
<hr/>		
<u>Household Income</u>	<u>%</u>	<u>%</u>
Less than \$6,000	11	15
\$6,000 - \$9,999	24	24
\$10,000 - \$14,999	33	49
\$15,000 - \$19,999	22	12
\$20,000 plus	10	-

TABLE E-2

U.S. VISITORS TO THE SAULT STE. MARIE-WAWA ZONE

Total U.S. Visits - 777,000 (represents 29% of total person visits to zone)		
<u>Activity Related Expenditures</u>		
Activity	Expenditures (000)	% of total expenditures by U.S. Visitors
Sightseeing/Touring	5,467	32
Visiting Friends/Relatives	2,021	12
Outdoor Recreation/Visiting Own Cottage/Resort Vacation	5,342	31
Shopping	426	3
Other Business	714	4
Other Non-Business Commuting	1,917	12
Special Events	533	3
Visiting Ontario Cities/ Towns	378	2
En Route to U.S. or Other Provinces	242	1
Total Expenditures by Visitors Originating in U.S.	17,040 (represents 46% of total expenditures by all visitors to zone)	100
(continued)		

TABLE E-2 (cont'd.)

TOTAL NO. OF AUTOMOBILE PARTIES ORIGINATING IN U.S.
BETWEEN SEPTEMBER 1973 TO AUGUST 1974 - 239,500

Average Party Size - 3.15 Persons

<u>Origins</u>	<u>% of Total No. of Visiting Parties</u>
Michigan	73.5
New York	.2
Ohio	6.8
Pennsylvania	1.8
Illinois	2.2
Minnesota	.5
Rest of U.S.	<u>14.9</u>
Total No. of U.S. Automobile Parties	100

<u>Main Reason for Visit</u>	<u>% of Total No. of Automobile Parties</u>
Commuting to or from Work	1.5
Attending a Convention	--
Other Business Reasons	2.9
Combined Business and Pleasure	1.4
Convenient Route to My Destination in U.S.A.	1.8
Convenient Route to My Destination in Other Provinces	--
To Visit Friends or Relatives	10.3
To Stay at Cottage, Cabin, etc., I Own	3.3
To Vacation at an Ontario Resort, Cottage	8.1
Outdoor Recreational Activities	13.7
To See Niagara Falls	.5
Touring Ontario Countryside	38.2
To Shop	2.9
To Visit Ontario Cities or Towns	2.6
To Attend a Special Event	2.6
Other Non-business Reasons	<u>10.4</u>
Total No. of U.S. Automobile Parties	100

(continued)

TABLE E-2 (cont'd.)

TOTAL NUMBER OF U.S. PARTY DAYS BETWEEN SEPTEMBER 1973
AND AUGUST 1974 - 1,197,400

<u>Main Activities</u>	<u>% of Total Party Days</u>
Swimming	12.9
Motor Boating	13.3
Canoeing	2.6
Sailing	.4
Water Skiing	.6
Fishing	17.0
Big Game Hunting	.2
Bird/Small Game Hunting	--
Hiking	5.2
Picknicking	4.0
Horseback riding	--
Golfing	.1
Tennis	--
Downhill Snowskiing	.2
Snowmobiling	.1
Nature Study	5.5
Visiting Museums/Art Galleries	.2
Bicycling, Motor or Trail Biking	1.6
Visiting Historic Sites	2.4
Attending Spectator Sports	.1
Attending Special Events	26.8
Specialized Shopping (Gifts or Souvenirs)	<u>6.2</u>
Total No. of Party Days	

(continued)

TABLE E-2 (cont'd.)

TOTAL NUMBER OF U.S. PARTY NIGHTS BETWEEN SEPTEMBER 1973 AND
AUGUST 1974 - 532,600

<u>Accommodation</u>	<u>% of Total No. of Party Nights</u>
Home of Friends/Relatives	12.8
Own Cottage	18.4
Hotel/Motor Hotel/Motel (total)	18.4
Resort Lodge	4.5
Rented Cabins/Cottage	25.1
Trailer Park Campsite	11.4
Outfitter/Hostel/Other (total)	8.8
Total U.S. Party Nights	100
% of Parties Staying One or More Nights	23.9
Average No. of Nights per Party	4.18

<u>Length of Stay</u>	<u>% of Total No. Parties</u>
0 Nights	46.9
1 Night	12.7
2 Nights	14.4
3 Nights	4.3
4 or More Nights	21.7
Total No. of U.S. Automobile Parties	100
Average No. of Nights per Party	2.22 (includes day visitors)

<u>Age</u>	<u>% of Total U.S. Visitors</u>
Under 12	11.3
12 - 19 (total)	23.2
20 - 34 (total)	19.5
35 - 44	10.9
45 - 64 (total)	31.2
65 plus	4
Total	100

<u>Income</u>	<u>% of Total (Based on Income Parties of Party Head</u>
Under \$6,000	8.6
\$6,000 - \$9,999	17.2
\$10,000 - \$14,999	45.6
\$15,000 - \$24,999	18.1
\$25,000 plus	10.6
Total	100

APPENDIX F

SUB-ZONE AREAS SUPPLEMENTARY INFORMATION

APPENDIX F

SUB-ZONE AREAS SUPPLEMENTARY INFORMATION

F-1 Sault Ste. Marie Sub-zone

a. Area - 250 Square miles (approximately)

b. Population

Sault Ste. Marie	80,332 (1971)
Prince Township	666 (1971)
Rankin Indian Reserve	340 (1971)
Garden River Indian Reserve	<u>700 (1971)</u>
Total	82,038

c. Land Use

Farm land	5.3%
-----------	------

d. Employment % of Labour Force (1974)

Manufacturing	49	(iron, steel, coke, by-products, newsprint, veneer, hardware, lumber, railway ties, printing, publishing)
Service	38	
Retail	13	
Trade	15	(1961)
Agriculture, Fishing, Trapping, Forestry, Mining	>	.1

Industry Makeup (1974): Manufacturing 30%, Service 30%, Retail 40%

e. Transportation

Rail	Canadian Pacific Railway
	Algoma Central Railway
Air	Air Canada
	Transair
	Air Dale Ltd.
	North Central Airlines
	Norontair

Water Canada Steamship Lines
 Yank Canuck Steamship Lines
 Algoma Central Railway, Maritime Division

Road Highway 17 (Trans Canada Highway)
 Numerous trucking firms
 Greyhound Bus Lines
 Sault Ste. Marie Transportation System

f. Tax Structure

TAX STRUCTURE	Mill Rates By Tax Class (1974).		
	Residential & Farm	Commercial & Business	Special Charges
Sault Ste. Marie	47.1	48.4	4.3
Prince Township	82.5	17.4	nil

F-2 Wawa Sub-zone

a. Area - 400 square miles (approximately)

b. Population

Wawa (townsite)	4,577
Michipicoten Harbour	102
Michipicoten River	<u>155</u>
Total (1966)	4,834
(1976 estimate)	5,800

c. Land Use

Open space	majority
Commercial	along Highway 17, in towns
Industrial	at ore sites
Farmland	minimal

d. Employment

Portion of Labour Force

Mining (iron and associated processing, sulfur)	50%
Personal Services	15%
Education	10%
Trade	8%
Lumbering	4%
Tourism	Significant (seasonal)
Sand & Gravel Extraction	Significant

e. Transportation

Rail	Algoma Central Railway
Air	Air Dale Ltd., White River Air Services Ltd.
Road	# 17, 101 Highway Transport Companies Lack of good quality local roads, good to adequate roads in Wawa (townsite)

f. Tax Structure (for municipalities in the sub-zone)

Mill Rates

Commercial		Residential		} Mill Rate 1973
Public	24.7	Public	20.5	
Separate	24.6	Separate	20.5	
Commercial		Residential		
Public	25.7	Public	20.4	
Separate	25.2	Separate	20.1	

F-3 Highway 17 North Sub-zone

a. Area - 2,200 square miles (approximately)

b. Population

Permanent 2,800 (1968)

Seasonal 5,000

Permanent population along major highways and in the isolated mining communities.

Seasonal population along Lake Superior shoreline and around major accessible lakes. Batchawana, Karalash Corners, Goulais River, Searchmount and Heyden are communities of 200 to 500 population; remainder are smaller hamlets.

c. Land Use

	<u>% of Total (approximately - 1975)</u>
Open space	76
Tourism, Recreation	22
Residential	1
Commercial	.15
Indian Reserve	.15
Public and Semi-Public	.10
Utility	.10
Farmland	.01
Industrial	.01

d. Employment -(1968 figures, labour force - about 500 permanent)

Mining 35%

Lumbering 39%

Retail Sales & Service 20% (significant proportion - seasonal)

Tourism, Recreation significant, 200% seasonal fluctuation

Industrial virtually non-existent

e. Transportation (1975)

Road	Highway #17
Air	Through Wawa and Sault Ste. Marie - none local
Bus	Serviced twice a day between Wawa and Sault Ste. Marie

f. Tax Structure

PROPOSED 1972 EDUCATION BUDGET MILL RATES

	Commercial Elementary	Residential	Commercial	Secondary Residential
Searchmont	7.93	7.14	2.79	2.51
Aweres	6.72	6.05	2.49	2.24
Mountain View	7.02	6.32	2.00	1.80
Batchawana	6.45	5.81	2.43	2.19
Montreal River	1.91	1.72	2.53	2.28

F-4 Highway 17 East Sub-zone

a. Area - 1,200 square miles (approximately)

b. Population

	<u>(1971)</u>	<u>(1975)</u>
Thessalon	1879	1853
Thessalon Township	785	750
Bruce Mines	505	480
Plumber Additional Township	533	360
Johnson Township	599	621
Day Bright Additional Township	251	265
Laird Township	689	700
MacDonald, Meredith & Aberdeen Additional Township	1305	1272
Tarbut and Tarbutt Additional Township	254	261
St. Joseph Island- Hilton Beach	165	194
Hilton Township	94	111
St. Joseph Township	861	1122
Jocelyn Township	<u>104</u>	<u>131</u>
	8024	10,120

1558

c. Land Use (1971)*

% of Total Land Area in Use for Farmland

Thessalon	
Thessalon Township	25
Bruce Mines	
Plumber Additional Township	26
Johnson Township	30
Day Bright Additional Township	1
Laird Township	49
MacDonald, Meredith & Aberdeen Additional Township	24
Tarbutt and Tarbutt Additional Township	31
St. Joseph Island**	
Hilton Beach	
Hilton Township	
St. Joseph Township	
Jocelyn Township	



3.7

*More detailed breakdown of land use not available.

**St. Joseph Island - additional land use breakdown: Rural - 22%;
Resource Recreation - 77%; Urban - 1%.

d. Employment (number employed)

	Manufacturing (Construction, Wholesale)	Mining	Commercial	Retail	Service	Government	Tourism	Farming	Notes
Thessalon	38%		(281)	31%	30%	(91)		(5)	
Thessalon Township	Lumber (55)		(23)			(18)			
Bruce Mines	No Major 23%	in- active mines	(110)	41%	31%	(18)	Major		
Plumber Additional Township	(9)		(12)			(19)			
Johnson Township	14%*		(34)	45%*	41%*	(10)			
Day Bright Additional Township	(7)		(41)			(7)			
Laird Township	Nil					Nil		Some	
MacDonald, Meredith & Aberdeen Additional Township	10%**			61%**	29%**	(9)			
Tarbutt & Tarbutt Additional Township	Nil		(16)			(7)			
St. Joseph Island Hilton Beach	Nil		(37)			(14)	Only Major Ind.	Very Active	80% Commute
Hilton Township	(4)		(4)			(8)	Major Secondary Industries		To Sault St. Marie
St. Joseph Township	Metal Furniture (65)		(74)			(12)	Major Ind.	Active (25)	for Employment (27
Jocelyn Township	Nil		(19)			(7)	Major Secondary Industries		Miles)

*For town of Desbarats only

**For town of Echo Bay only

e. Transportation (1975)

	Rail	Air	Water	Highway
Thessalon	CPR	Air Canada Transair Norontair From Sault Ste. Marie	Bigras & Belle Rose Fisheries	Greyhound Bus Numerous Trucking #17, 129
Thessalon Township	CPR		Nil	"
Bruce Mines	CPR		Nil	#17, 561
Plumber Additional Township	CPR	"	Nil	#17
Johnson Township	CPR	"	Nil	Greyhound Bus #17
Day Bright Additional Township	CPR	"	Nil	"
Laird Township	Nil	"	Nil	#17
MacDonald, Meredith & Aberdeen Additional Township	CPR	"	Nil	
Tarbutt & Tarbutt Additional Township	CPR	"	Nil	Greyhound Bus Numerous Trucking #17
St. Joseph Island				
Hilton Beach	Nil	"	Nil	#548
Hilton Township	Nil	"	Nil	"
St. Joseph Township	Nil	"	Nil	"
Jocelyn Township	Nil	"	Nil	"

f. Tax Structure (1974)

	Public School Residential	Public School Commercial	Education	Municipal/Public Residential	General Residential/Commercial	General Residential	Elementary Residential	Secondary Residential	Elementary Commercial	Secondary Commercial
Thessalon	12.3*	17	13.7	14.2						
Thessalon Township	9.4	10.5			7.4	9.1				
Bruce Mines	17	18.8	13.6							
Plumber Additional Township	11.4	12.7			7.5	8.5				
Johnson Township	10.9	12.1			8.8	9.7				
Day Bright Additional Township	4	4.5		4.4	4.9	2.6	2.9			
Laird Township									5.5	4
MacDonald, Meredith & Aberdeen Additional Township	5.5	6.1							4	4.5
Tarbutt & Tarbutt Additional Township	9	10				4.8	5.5			
St. Joseph Island Hilton Beach	23.5	26.6								
Hilton Township	9.4	10.4			10.6	11.6				
St. Joseph Township	12.3	13.7								
Jocelyn Township	10.2	11.3		7.0	8.0					

*Mill Rate

SELECTED REFERENCES

SELECTED REFERENCES - CHAPTER II

Natural Resources/Features

- Chapman, L. J., and Brown, D.M. "The Climates of Canada for Agriculture."
In the Canada Land Inventory Report #3. Environment Canada.
Ottawa: Queen's Printer, 1976.
- Government of Canada. Atmospheric Environment Service. Department of
the Environment. The Tourist and Outdoor Recreation Climate of
Ontario. Toronto, 1973.
- Hedlin Menzies and Associates Incorporated. North Shore Lake Superior
Recreation Study. Volume 1 Physical and Economic Studies.
Toronto, June 1974.
- Murray V. Jones and Associates Limited. Official Plan of the Township of
Michipicoten. Toronto, August, 1969.
- Ontario Government. Department of Treasury and Economics. Design For
Development: Northeastern Ontario Region. Toronto, January 23,
1971. (Phase I: Analysis)
- Ontario Government. Economic Atlas of Ontario. Toronto: University of
Toronto Press, 1969.
- Ontario Government. Ministry of Industry and Tourism. "Development of
Tourism in Northern Ontario Preliminary Planning Concept"
(Short Term-5-10 Years). Report A-1. Toronto, N.D.
- Ontario Government. Ministry of Industry and Tourism Northeastern Ontario.
"Ontario Sault Ste. Marie District Office Area Profile."
Sudbury, August, 1975.
- Ontario Government. Ministry of Natural Resources. "Background Information
and Approach to Policy: Northeastern Ontario Planning Region."
A report for the Strategic Land Use Plan, First Draft, 1975.
- Ontario Government. Ministry of Natural Resources. Division of Parks.
"Ontario Provincial Parks: Interim Statistical Report."
Toronto: Province of Ontario, 1975.
- Ontario Government. Ministry of Natural Resources. Division of Parks.
Park Reserve Review Chart. Toronto: Province of Ontario, March, 1975.

Ontario Government. Ministry of Natural Resources. "Northeastern Region-Sensitive Area Reports." Sault Ste. Marie, February, 1975.

Ontario Government. Ministry of Natural Resources. Proposed Policies for Discussion in the Preparation of Ministry of Natural Resources Strategic Land Use Plan. Toronto: Province of Ontario, 10 February, 1975.

Ontario Government. Ministry of Natural Resources. Summary of Hunting Regulation. Toronto: Province of Ontario, 1976.

Ontario Government. Ministry of Natural Resources. "Technical Analysis of the Natural Resources Northeastern Planning Region." Toronto, December, 1974.

Sault North Citizens Advisory Committee, Sault North Technical Advisory Committee and the Ontario Government, Ministry of Treasury, Economics and Intergovernmental Affairs. Proposals: Planning and Development Policies for Sault North. Sault Ste. Marie, June, 1975.

Sault Ste. Marie and Area Planning Board and Sawchuk and Peach Architects-Planners. "Technical Appendix to Sault Ste. Marie North Background Survey and Concept Plan." Sault Ste. Marie, November, 1972.

Sault Ste. Marie and Suburban Area Planning Board. Official Plan of the Sault Ste. Marie and Suburban Planning Area. Sault Ste. Marie: The Corporation of the City of Sault Ste. Marie, 21 October, 1968. (Office Consolidation)

St. Joseph Island Planning Board and Sawchuk and Peach Architects-Planners. St. Joseph Island Official Plan. St. Joseph Island, April, 1973. (Final Draft.)

Historical and Cultural Resources

Algoma Central Railway. Brief History on the Algoma Central Railway. Sault Ste. Marie. (Mimeographed.)

Ministry of Industry & Tourism, Northeastern Ontario. "Ontario Sault Ste. Marie District Office Area Profile." Sudbury, 1975. (Mimeographed.)

Ontario Government. Ministry of Natural Resources. Division of Parks. Historical Sites Branch. A Topical Organization of Ontario History. Toronto: Government of Ontario, 1972.

Sawchuk & Peach, Architects-Planners & St. Joseph Island Planning Board. St. Joseph Island Official Plan. St. Joseph Island, 1973.

Sawchuk & Peach Architects-Planners. "Sault Ste. Marie North Official Plan (Preliminary Draft)." Sault Ste. Marie: Sault Ste. Marie & Area Planning Board, 1972.

Turcott, Agnes. A History of Wawa & the Michipicoten Area. Dryden: Alex Wilson Publications Ltd.,

Service Centres

Co-operative Extension Service. Recreation and Tourism Series. Tourism and Your Community. Extension Bulletin E-729. Michigan: Michigan State University, November, 1971.

Gunn, C. Vacationscape - Designing Tourist Regions. Austin: University of Texas, 1972.

Ontario Government. Ministry of Treasury Economics and Intergovernmental Affairs. Regional Planning Branch. Design for Development, Ontario's Future: Trends and Options. Toronto: Government of Ontario, March, 1976.

Tourism Plant - Attractions and Events

Business Management Students. Sault College of Applied Arts and Technology. "Bon Soo Carnival Survey, February, 1973." Sault Ste. Marie, 1973.

Government of Canada. Canadian Government Office of Tourism. "Canadian Annual Vacation Patterns Survey, 1974." (Tape), Ottawa.

L. J. D'Amore and Associates Ltd. "Synopsis of Views From Round I, Delphi Survey, Tourism in Canada 1986." (unpublished) Ottawa: 1976.

Ontario Government. Ministry of Culture and Recreation. A Directory of Provincially Significant Resources of Ontario. Toronto: Government of Ontario, (no date).

Ontario Government. Ministry of Industry and Tourism. Events and Attractions, Ontario 1975. Toronto: Province of Ontario, 1975.

Ontario Government. Ministry of Industry and Tourism. Events (Winter/Spring/Summer/Fall). Toronto: Province of Ontario, (no date).

Ontario Government. Ministry of Industry and Tourism Northeastern Ontario. "Golf Course Feasibility Thessalon. Sudbury, 12 January, 1976. (Draft.)

R. C. Greaves & Associates, Inc. "King Mountain Recreation Area - Feasibility Study." (Confidential.) Wisconsin: R. C. Greaves & Associates, Inc. Landscape Architects Planning Consultants, 1973.

P. S. Ross & Partners. "A Study Of The Potential Market For A Destination Resort At King Mountain, Ontario." (Confidential.) Vancouver: P. S. Ross & Partners Management Consultants, October, 1973.

Wyse, James W. "A Financial Feasibility Study Into The Development Of A Destination Resort At King Mountain." (Confidential.) North Vancouver: James W. Wyse Recreation Consultant, October, 1973.

Tourism Plant - Accommodation

Association of Tourist Resorts of Ontario. Ontario Resorts Meeting Guide. Toronto: Province of Ontario, 1975.

Government of Canada. Canadian Government Office of Tourism. "Canadian Annual Vacation Patterns Survey, 1974." (Tape), Ottawa.

Laventhol and Horwath Management Consultants. Trends of Business in Hotels. Pennsylvania: No Publisher, 1975.

L. J. D'Amore and Associates Ltd. "Synopsis of Views From Round I, Delphi Survey, Tourism in Canada 1986." (unpublished) Ottawa: 1976.

Ontario Government. Liquor Licence Board of Ontario. "List of Algoma Area Establishments Licenced by Liquor Licence Board of Ontario." Toronto, 12 June, 1976. (Card Index.)

Ontario Government. Ministry of Industry and Tourism. Adventures: Ontario/Canada, Accommodation '75-76. Toronto: Province of Ontario, 1975.

Ontario Government. Ministry of Industry and Tourism. Adventures: Ontario/Canada, Camping '75-76. Toronto: Province of Ontario, 1975.

Ontario Government. Ministry of Industry and Tourism. Convention Facilities Guide. Toronto: Province of Ontario, 1975.

Ontario Government. Ministry of Industry and Tourism. Department of Tourism and Information. Analysis of Ontario Cottage Survey. Toronto: Province of Ontario, 1971.

Ontario Government. Ministry of Industry and Tourism Northeastern Ontario. "List of Establishments Licenced in Sault Ste. Marie District by the Ministry of Industry and Tourism." Sault Ste. Marie, 17 June, 1976. (Mimeographed.)

Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. Commercial Accommodation Establishment Occupancy. Toronto: Province of Ontario, October, 1975.

- Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. Commercial Accommodation Establishment Occupancy, January 1975. Toronto: Province of Ontario, May, 1975.
- Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. "United States Auto Exit Survey 1973-74." (Tape)
Toronto: Province of Ontario.
- Ontario Government. Ministry of Natural Resources. "Background Information and Approach to Policy: Northeastern Ontario Planning Region."
A report for the Strategic Land Use Plan, First Draft, 1975.
- Ontario Government. Ministry of Natural Resources. Division of Parks. "Ontario Provincial PARKS: Interim Statistical Report."
Toronto: Province of Ontario, 1975.
- Ontario Government. Tourism and Outdoor Recreation Planning Study Committee. Ontario Recreation Survey, Progress Report No. 2, May-October 1973.
Toronto: Province of Ontario, 1974.
- Ontario Hydro Electric Commission. Number of Seasonal Residences with Ontario Hydro Contracts, 1968-1973. Toronto: 1973.
- Statistics Canada. Travel Between Canada and Other Countries. Ottawa: Information Canada, December, 1975.

Tourism Plant - Food Services

- Burkart, A. J., and Medlik, S. Tourism. London: William Heinemann Ltd., 1974.
- Gunn, C. Vacationscape - Designing Tourist Regions. Austin: University of Texas, 1972.
- McIntosh, R. W. Tourism Principles, Practices, Philosophies. Columbus, Ohio: Grid Inc., 1972.
- Ontario Government. Ministry of Health. District Health Office. "Restaurants" Sault Ste. Marie, 1976. (Mimeographed List.)
- Ontario Government. Ministry of Industry and Tourism. Adventures: Ontario/Canada, Accommodations '75-76. Toronto: Province of Ontario, 1975.

Tourism Plant - Information Services

- Gunn, C. Vacationscape - Designing Tourist Regions. Austin: University of Texas, 1972.
- McIntosh, R. W. Tourism Principles, Practices, Philosophies. Columbus, Ohio: Grid Inc., 1972.
- Ontario Government. Ministry of Industry and Tourism. Tourism Promotion '75-76. Toronto: Province of Ontario, 1975.

Tourism Plant - Transportation

- Donnelly, M., and Lathern, J. "Energy and Tourism." Recreation Review. Volume 4, Number 3, (August 1975): p.p. 7-12.
- Government of Canada. Department of Indian and Northern Affairs. 1975 Canals Traffic Statistics. Ottawa: Parks Canada, December, 1975.
- Government of Canada. Transport Canada. An Interim Report On Inter-City Passenger Movement in Canada. Ottawa: Ministry of Transport, June, 1975.
- Gunn, C. Vacationscope - Designing Tourist Regions. Austin: University of Texas, 1972.
- L. J. D'Amore and Associates Ltd. "Synopsis of Views From Round I, Delphi Survey, Tourism in Canada 1986." (unpublished) Ottawa: 1976.
- M. M. Dillon Limited in Association with Gugula, Smedley and Barbon. Sault Ste. Marie Region Conservation Authority-Waterfront Development Study. Toronto, October, 1976.
- Ontario Government. Department of Highways. Planning Branch. Traffic and Planning Studies Division. (several regional highways studies reports), Toronto: Province of Ontario.
- Ontario Government. Ministry of Industry and Tourism. Northeastern Ontario Regional Office. "Sault Ste. Marie Provincial Travel Information Centre-Visitor Statistics." Sault Ste. Marie, 1976. (Mimeographed.)
- Ontario Government. Ministry of Natural Resources. Northeast and Algonquin Regions in Cooperation with Small Craft Harbours Branch-Environment Canada. "The Georgian Bay-North Channel Access Study." Volume 1&2. (unpublished) Toronto: 1976.
- Ontario Government. Ministry of Transportation and Communications. 1974 Permanent Counting Stations Annual Report. Toronto: Province of Ontario, 1975.

Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. "United States Auto Exit Survey, 1973-74." (Tape)
Toronto: Province of Ontario.

Ontario Government. Ministry of Transportation and Communications. Planning Division. "Norontair Monitoring Report No. 5." Phase I to March 31, 1975: Kapuskasing, Timmins, Kirkland Lake, Earlton, Sault Ste. Marie, Sudbury, North Bay, (nod ate).

Ontario Government. Ministry of Transportation and Communications. Systems Analysis Office. Systems Planning Branch. Traffic Volumes 1974 On the King's Highway and Secondary Highways. Toronto: Province of Ontario, 1974.

Tharby, R. D. "The Interaction of Energy and Transporation." A paper for Gulf Oil Canada Limited, Research and Development Department, Sheridan Park, (no date).

Tourism Plant - Picnic Grounds, Boat Docks/Launches and Golf Courses

Ontario Government. Ministry of Natural Resources. "Background Information and Approach to Policy: Northeastern Ontario Planning Region." A Report for the Strategic Land Use Plan, First Draft, 1975.

Ontario Government. Ministry of Natural Resources. Sault Ste. Marie District Office. "Water Access Points." Sault Ste. Marie, 1976. (Mimeographed List and Map.)

Ontario Government. Ministry of Natural Resources. Wawa District Office. "Water Access Points." Wawa, 1976. (Mimeographed List and Map.)

Markets and Market Potential

Donnelly, M., and Lathern, J. "Energy and Tourism." Recreation Review. Volume 4, Number 3, (August 1975): p.p. 7-12

Government of Canada. Canadian Government Office of Tourism. "Canadian Annual Vacation Patterns Survey 1974." (Tape), Ottawa.

Government of Canada. Canadian Government Office of Tourism. Industry Development Branch. Tourism in Canada: A Situation Report in Brief. Ottawa: Queen's Printer, 1975.

Government of Canada. Canadian Government Office of Tourism. Industry Development Branch. Tourism: Its Magnitude and Significance. Ottawa: Queen's Printer, 1974.

Government of Canada. Canadian Government Office of Tourism. Marketing Branch. Vacation Attitudes and Vacation Patterns of Canadians, 1974. Ottawa: Queen's Printer, 1976.

Institute of Opinion and Market Research Ltd. Algoma Area Visitors Survey-Spring 1972. Toronto: Province of Ontario, 1972.

L. J. D'Amore and Associates Ltd. "Synopsis of Views From Round I, Delphi Survey, Tourism in Canada 1986." (unpublished) Ottawa: 1976.

Ontario Government. Department of Tourism and Information. Travel Research Branch. Algoma Area Visitors Study-Summer 1970. Toronto: Province of Ontario, 1970.

Ontario Government. Ministry of Industry and Tourism. Northeastern Ontario Regional Office. "Sault Ste. Marie Provincial Travel Information Centre-Visitor Statistics." Sault Ste. Marie, 1976.

Ontario Government. Ministry of Industry and Tourism. Tourism and Recreation Studies Branch. A Survey of Visitors to Ontario Government Travel Information Centres 1968, 1969 and 1970. Toronto: Province of Ontario, 1972.

Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. Tourism Statistical Handbook 1975. Toronto: Province of Ontario, 1975.

Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. U.S. Automobile Visitors to Algoma Kinniwabi Travel Association Area 1974. Toronto: Province of Ontario, November 1976.

Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. "United States Auto Exit Survey 1973-74." (Tape) Toronto: Province of Ontario.

Ontario Government. Tourism and Outdoor Recreation Planning Study Committee. "Ontario Recreation Survey." (Tape), Toronto: Province of Ontario 1973-74.

Statistics Canada. Travel, Tourism and Outdoor Recreation, A Statistical Digest. Ottawa: Information Canada, 1973-74.

Statistics Canada. Travel Between Canada and Other Countries. Ottawa: Information Canada, August, 1975.

Intervening Opportunities

- Balmer, Crapo and Associates. "Tourism Development in Ontario: A Framework For Opportunity." Report for the Ontario Government, Ministry of Industry and Tourism. Waterloo, 31 March, 1976.
- Michigan Travel Commission. East, West and Upper Michigan Tourist Association. A variety of informative and promotional literature describing the recreational opportunities in Michigan. 1976.
- Ontario Government. Ministry of Culture and Recreation. A Directory of Provincially Significant Resources of Ontario. Toronto: Government of Ontario, (no date).
- Ontario Government. Ministry of Industry and Tourism. Events and Attractions, Ontario 1975. Toronto: Province of Ontario, 1975.
- Ontario Government. Ministry of Industry and Tourism. Events (Winter/Spring/Summer/Fall). Toronto: Province of Ontario, (no date).
- Ontario Government. Ministry of Industry and Tourism. Ontario Travel Counsellors Directory 1975. Toronto: Province of Ontario, 1975.
- Ontario Government. Ministry of Industry and Tourism. Tourism and Recreation Studies Branch. A Survey of Visitors to Ontario Government Travel Information Centres 1968, 1969 and 1970. Toronto: Province of Ontario, 1972.
- Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. Tourism Statistical Handbook 1975. Toronto: Province of Ontario, 1975.
- Ontario Government. Ministry of Industry and Tourism. The Traveller's Encyclopedia of Ontario. Toronto: Province of Ontario, (no date).

Existing Operators' Attitudes and Desires

Interviews with individuals in provincial, regional and local government and in private enterprise. Refer to preface for name of persons contacted. 1976.

Population - A Resource and Its Attitude

Ontario Government. Ministry of Natural Resources, Northern Affairs Branch. Directory of Statistics and Data for Incorporated Communities in the Northeastern Region. Sudbury: Province of Ontario, April, 1975.

Ontario Government. Ministry of Treasury, Economics and Intergovernmental Affairs. Regional Planning Branch. Statistical Appendix - Northeastern Ontario Planning Region. Sudbury: Province of Ontario. (no date).

O' Staff and O' Staff Limited. "Resident Perceptions of Tourism Development in Sault Ste. Marie, Wawa, Bruce Mines and St. Joseph Island." Toronto, August 1976.

Sault North Citizens Advisory Committee and the Project Development Branch of the Ministry of Treasury, Economics and Intergovernmental Affairs. "Sault North Speaks." Sault Ste. Marie, February, 1975. (Mimeographed.)

Land Ownership and Planning Jurisdictions

M. M. Dillon Limited in Association with Gugula, Smedley and Barban. Waterfront Development Study. Sault Ste. Marie, October, 1976.

Murray V. Jones and Associates Limited. Official Plan of the Township of Michipicoten. Toronto, August, 1969.

Murray V. Jones and Associates Limited. Sault Ste. Marie City Centre Study. Sault Ste. Marie: Corporation of the City of Sault Ste. Marie, December, 1973.

Ontario Government. Ministry of Natural Resources. "Background Information and Approach to Policy: Northeastern Ontario Planning Region." A report for the Strategic Land Use Plan, First Draft, 1975.

Ontario Government. Ministry of Natural Resources. "Lake Superior Provincial Park - Master Plan Background Information." (unpublished), Sault Ste. Marie: 1976.

St. Joseph Island Planning Board and Sawchuk & Peach Architects-Planners. St. Joseph Island Official Plan. St. Joseph Island, April, 1973. (Final Draft.)

Sault North Citizens Advisory Committee, Sault North Technical Advisory Committee and the Ontario Government, Ministry of Treasury Economic and Intergovernmental Affairs. Proposals: Planning and Development Policies for Sault North. Sault Ste. Marie, June, 1975.

Sault Ste. Marie and Area Planning Board and Sawchuk & Peach Architects-Planners. "Technical Appendix to Sault Ste. Marie North Background Survey and Concept Plan." Sault Ste. Marie, November, 1972.

Sault Ste. Marie and Suburban Area Planning Board. Official Plan of the Sault Ste. Marie and Suburban Planning Area. Sault Ste. Marie: Corporation of the City of Sault Ste. Marie, 21 October, 1968. (Office Consolidation.)

SELECTED REFERENCES - CHAPTER III

Development Objectives

- Balmer, Crapo & Associates Inc., "Tourism Development in Ontario: A Framework for Opportunities." Report for the Ontario Ministry of Industry and Tourism. Waterloo, 31 March, 1976.
- Balmer, Crapo & Associates Inc., "Tourism Development Strategy: Tourism Development Branch, Ontario Ministry of Industry and Tourism." Waterloo: Balmer, Crapo & Associates Inc., 15 December, 1974.
- Bureau of Management Consultants. "Tourism Profile: Ontario." Report for the Canadian Government Office of Tourism. Ottawa, 1974.
- Burkart, A. J., and Medlik, S. Tourism. London: William Heinemann Ltd., 1974.
- Coomber, Nicholas H. and Biswas Asit K. Evaluation of Environmental Intangibles. Ottawa: Environment Canada, June, 1972.
- Donnelly, M., and Lathern, J. "Energy and Tourism." Recreation Review. Volume 4, Number 3, (August, 1975): p.p. 7-12.
- Economic Intelligence Unit. Special Artical No. 8. "The Role of Tourism in Economic Development: Is it a benefit or a burden?" The International Tourism Quarterly 138 (1973): p.p. 53-68.
- Honourable William G. Davis. Premier of Ontario. "Protecting Ontario's Future Throuhg Managed Growth." Statement to the Ontario Legislature, 8 April, 1976.
- Honourable Darcy McKeough. Treasurer of Ontario. "Protecting Ontario's Future Through Managed Growth." Statement to the Ontario Legislature, 8 April, 1976.
- Government of Canada. Canadian Government Office of Tourism. Industry Development Branch. Tourism in Canada: A Situation Report in Brief. Ottawa: Queen's Printer, 1975.
- Government of Canada. Canadian Government Office of Tourism. Industry Development Branch. Tourism: Its Magnitude and Significance. Ottawa: Queen's Printer, 1974.
- Government of Canada. Canadian Government Office of Tourism. Marketing Branch. Vacation Attitudes and Vacation Patterns of Canadians, 1974. Ottawa: Queen's Printer, 1976.

- Guertin, Dr. Pierre S. "The Impact of Tourism and Outdoor Recreation on the Rural Environment: Analysis of the Problem and Recommendations." Prepared for the Canadian Council on Rural Development. Quebec: University of Laval, June, 1975.
- Gunn, Dr. Clare A. "Tourism Planning Technique." A talk presented at the Travel Industry Planning and Development Seminar, Canadian Government Conference Centre, Ottawa, 20 March, 1974.
- Gunn, C. Vacationscape - Designing Tourist Regions. Austin: University of Texas, 1972.
- L. J. D'Amore & Associates LTd., "Synopsis of Views From Round I, Delphi Survey, Tourism in Canada 1986." (unpublished), Ottawa: 1976.
- Ontario Government. Ministry of Industry and Tourism. "Development of Tourism in Northern Ontario. Preliminary Planning Concept." Report A-1; Background Data: Statistical. Toronto: Ministry of Industry and Tourism.
- Ontario Government. Ministry of Natural Resources. "Proposed Policies for the Discussion in the Preparation of Ministry of Natural Resources Strategic Land Use Plan." Part One--Ontario. Toronto: Province of Ontario, 10 February, 1975.
- _____. Ministry of Treasury Economics and Intergovernmental Affairs. Design for Development - Ontario's Future: Trends and Options. Toronto: Province of Ontario, March, 1976.
- _____. Also numerous other documents in the Design for Development series.
- Taylor, G. D. and Doctoroff, M. "An Approach to an Integrated Forecasting System for a National Tourism Office." Paper presented at a Seminar on Tourism Forecasts and Tourism and the Balance of Payments, United Kingdom, September 23, 1974. Ottawa: Canadian Government Office of Tourism, 10 September, 1974.

SELECTED REFERENCES - CHAPTER IV

Development Principles and Opportunities

- Balmer, Crapo and Associates. "Tourism Development in Ontario A Framework for Opportunity." Report for the Ontario Government, Ministry of Industry and Tourism. Waterloo, 31 March 1976.
- Corporation of the City of Sault Ste. Marie. "Pine Street Marina Development and Operation." Sault Ste. Marie, 1 May 1973.
- Dixon, Bailey Associates Limited. "A Proposal for White Pines Auditorium - Sault Ste. Marie." Report for the Cultural Facilities Task Force. Sault Ste. Marie, April 1976.
- Government of Canada. Agriculture Canada. Race Track Supervision Pari-Mutuel Statistics 1976. Ottawa: Queen's Printer, 1976.
- Government of Canada. Office of Tourism. Industry Development Branch. Planning Canadian Campgrounds. Ottawa: Queen's Printer. (No date.)
- Government of Canada. Office of Tourism. The Inn Business. Ottawa: Queen's Printer, 1976.
- Government of Canada. Office of Tourism. Travel Industry Branch. Survey of the Capital Requirements of the Accommodation Sector of the Travel Industry in Canada: Data, Analysis and Conclusions. Ottawa. Queen's Printer, 1972.
- Harris, Kerr, Forster and Company. Trends in the Hotel/Motel Business. New York: Harris, Kern, Forster and Company, 1975.
- Heritage Canada. A Guide to Planning Conservation Areas. Ottawa: Heritage Canada, 28 April 1976.
- Heritage Canada. Investing in the Past A Report on the Profitability of Heritage Conservation. Ottawa: Heritage Canada, 8 November 1974.
- Interviews with individuals in provincial, regional and local government in private enterprise. Refer to preface for names of persons contacted. 1976.
- John M. A. McKay and Associates. "A Marine Parks Systems Concept - Overview and Action Plan." Report for The Canadian Government Office of Tourism. Ottawa, October 1975.

- Marketing Insights Ltd. "Awareness of Horse Races and a Description of Attendees vs. Non-Attendees." Report for Danau Advertising and Assiniboia Downs, Winnipeg, December-January 1974-1975.
- Marshall Macklin Monaghan Ltd. Maple Mountain. Report for Ministry of Industry and Tourism. Toronto: Province of Ontario, 4 May 1973.
- Marshall Macklin Monaghan Limited. "Tier Lalle Recreational Community Conceptual Plan." Report for Whitfall Associates Limited. Toronto. (No date.)
- Murray V. Jones and Associates Limited. Sault Ste. Marie City Centre Study. Sault Ste. Marie: Corporation of the City of Sault Ste. Marie, December 1973.
- Nance, J. V. Recreational Condominiums in Summit County, Colorado: Locational Factors and Policy Implications. Colorado: University of Colorado, 1976.
- National Association of Canadian Race Tracks. Survey Two. Rexdale: Canadian Racing Industry Information System, 1973.
- Ontario Government. Ministry of Culture and Recreation. Heritage Administration Branch. The Ontario Historical Society Listing of Heritage Funding Sources. Toronto: Province of Ontario, June 1976.
- Ontario Government. Ministry of Industry and Tourism. Tourism Research Branch. A Survey of Commercial Accommodation Establishments in Ontario. Volume 1: Employment Generated. Toronto: Province of Ontario, 1971.
- Ontario Racing Commission. 26th Annual Report of the Ontario Racing Commission for the year 1975. Toronto: Ontario Racing Commission, 1 April 1976.
- Pannell, Kerr, Forster and Company. International Hotel Trends 1975 Edition. Toronto: Harris, Kerr, Forster and Company, 1975.
- Peat, Marwick Associates. "A Review of Hotel Markets in Sault Ste. Marie." Report to C.P. Hotels Limited. Toronto, August 1974.
- P.S. Ross & Partners. "A Study of the Potential Market for a Destination Resort at King Mountain, Ontario." (Confidential): Vancouver: P.S. Ross & Partners Management Consultants, October 1973.

- P.S. Ross and Partners. "Attracting Capital for Major Tourism Development Opportunities in Canada." A Report to Canadian Government Office of Tourism. Ottawa, December 1974.
- Raymond Moriyama, Architects and Planners. "Northern Resources Exhibition Centre, Timmins." Feasibility Report for the Ontario Ministry of Industry and Tourism. Toronto, 1 November 1974.
- R. C. Greaves & Associates, Inc. "King Mountain Recreation Area - Feasibility Study" (Confidential) Wisconsin: R.C. Greaves & Assoc. Inc. Landscape Architects Planning Consultants, 1973.
- Restech Engineering. "General Utilities and Snowmaking for King Mountain." Report for Mountain View Corporation. London, May 1972.
- Roger de Toit Architects. "Low Cost Seasonal Accommodation. Phase I Working Report." Report to the Canadian Government Office of Tourism. Toronto, 25 March 1975.
- Sperry Associates Architects Limited. "Design Alternatives - Low Cost Seasonal Tourist Accommodation." Report to The Department of the Environment and Tourism, Province of Prince Edward Island. Charlottetown, 31 August 1973.
- Strong, C.Z. "Site Selection, Conceptual Plans and Costs for Site 'A' Maple Mountain."
- Time. How Hotels/Motels Register With Their Guests. New York: Time Inc., 1976
- The Travel Research Association. Marketing, Travel and Tourism. Seventh Annual Conference Proceedings. Salt Lake City, Utah: University of Utah, 1976.
- Woods, Gordon & Co. "The Financial Feasibility of the Maple Mountain Project." Report for the Ontario Ministry of Industry and Tourism. Toronto, June 1973.
- Wyse, James W. "A Financial Feasibility Study Into the Development of a Destination Resort at King Mountain." (Confidential) North Vancouver: James W. Wyse Recreation Consultant, October 1973.

